

Schools Forum
Wednesday, 12 October 2022 at 8.00 am
VENUE: Council Chamber - City Hall, Bradford

PLEASE NOTE

All meetings will be held in public; the agenda, decision list and minutes will be publicly available on the Council's website and Committee Secretariat, Room 112, City Hall, Bradford.

The taking of photographs, filming and sound recording of the meeting is allowed except if Councillors vote to exclude the public to discuss confidential matters covered by Schedule 12A of the Local Government Act 1972. Recording activity should be respectful to the conduct of the meeting and behaviour that disrupts the meeting (such as oral commentary) will not be permitted. Anyone attending the meeting who wishes to record or film the meeting's proceedings is advised to liaise with the Forum Clerk Asad Shah who will provide guidance and ensure that any necessary arrangements are in place. Those present who are invited to make spoken contributions should be aware that they may be filmed or sound recorded

1. APOLOGIES FOR ABSENCE

The Business Advisor (Schools) will report the names of alternate Members who are attending the meeting in place of appointed Members.

2. DISCLOSURES OF INTEREST

To receive disclosures of interests from Members on matters to be considered at the meeting. The disclosure must include the nature of the interest.

An interest must also be disclosed in the meeting when it only becomes apparent to the member during the meeting.

3. MINUTES OF 18 MAY 2022 & MATTERS ARISING

1 - 18

As the 6 July meeting was not quorate, and as the 14 September meeting went ahead as an informal briefing rather than as a formal meeting, the minutes from the 18 May meeting are still to be approved. The note, which summarised the briefing that was held on 14 September, and which has been circulated to all members, is copied here for completeness.

4. MATTERS RAISED BY SCHOOLS

Members will be asked to consider any issues raised by schools.

5. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS (a)

There are no allocations for consideration at this meeting.

6. CONSULTATION - PRIMARY AND SECONDARY MAINSTREAM FORMULAE & SCHOOLS BLOCK MATTERS 2023/24 (a) 19 - 70

The Principal Finance Officer (Schools) will present a report, **Document OX**, which asks the Schools Forum to consider the consultation document, which outlines the proposals for the Schools Block, the funding formula to be used to calculate allocations for mainstream Primary and Secondary schools and academies for the 2023/24 financial year, and the criteria that will form the basis of the allocation of additional funding to maintained schools (and academies where appropriate) from Schools Block centrally managed funds.

The Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 7 December. The Forum will then be asked to give its final views (its recommendations) on 11 January 2023.

Recommended –

The Schools Forum is asked to agree that the consultation (Document OX Appendix 1) is published

(Jonty Holden – 01274 431927)

7. CONSULTATION - HIGH NEEDS BLOCK FORMULAE FUNDING 2023/24 (a) 71 - 118

The Principal Finance Officer (Schools) will present a report, **Document OY**, which asks the Schools Forum to consider the consultation document, which outlines the formula approach that the Authority proposes to use to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year April 2023 to March 2024.

The Authority would like now to consult on these proposals. The feedback from this consultation will be presented to the Schools Forum on 7 December. The Forum will then be asked to give its final views (its recommendations) on 11 January 2023.

Recommended –

The Schools Forum is asked to agree that the consultation (Document OY Appendix 1) is published.

(Dawn Haigh – 01274 433775)

8. EARLY YEARS BLOCK FUNDING MATTERS 2023/24 (i)

The Business Advisor (Schools) will provide an update verbally on Early Years Block funding matters. No further announcements, since the 14 September Forum meeting, have been made by the DfE regarding the 2023/24 Early Years Block settlement or Early Years Single Funding Formula (EYSFF) arrangements.

The Early Years Working Group will begin to meet shortly to consider the development of our proposals.

Recommended –

The Schools Forum is asked to note the information provided.

(Andrew Redding – 01274 432678)

9. DSG CENTRAL ITEMS AND DE-DELEGATED FUNDS 2023/24 (a)

119 -
128

The Business Advisor (Schools) will present a report, **Document OZ**, which asks the Schools Forum to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items for the 2023/24 financial year.

Recommended –

(1) The Forum is asked to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items, to indicate what further consideration should be given / review work should take place, in advance of making final recommendations and decisions for 2023/24 at the 11 January 2023 meeting.

(2) Members representing Maintained Primary Schools are asked to decide on de-delegation in 2022/23 for the purposes of purchasing subscriptions to Fischer Family Trust.

(Andrew Redding – 01274 432678)

10. **SCHOOLS FORUM STANDING ITEMS (i)**

Updates on the following Forum standing items will be provided verbally where these have not been covered within other agenda items:

Schools Forum membership

- Update from the High Needs Block Steering Group
- Update from the Schools Financial Performance Group (SFPG)
- Update on School / Academy Budgets
- Update from the Early Years Working Group (EYWG)
- Update from the Formula Funding Working Group (FFWG)
- Update on Primary School Places
- Update on Academies & Free Schools

The Forum is asked to note the information provided.

(Andrew Redding – 01274 432678)

11. **AOB / FUTURE AGENDA ITEMS**

Members will be asked for any additional items of business, for consideration at a future meeting.

12. **DATE OF NEXT MEETING**

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 7 December 2022 (remote).

(a) Denotes an item for action (including where a formal view or recommendation is required).

(i) Denotes an item for information.

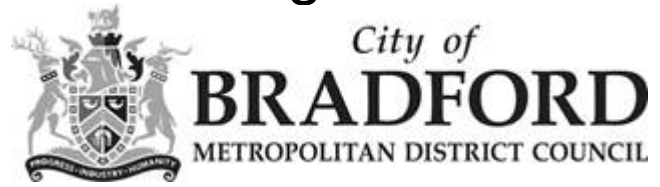
Signposting of High Needs Information

- As per the schedule presented on 14 October 2020, “Forum members are expected to access ‘outside of the Forum meetings’ wider SEND information that is presented to other groups and that is already published, including information presented to the SEND Partnership. The Authority will signpost this information (webpage links) for Forum members at the bottom of agendas.”

- SEND Partnership Board (minutes of meetings):

<https://localoffer.bradford.gov.uk/coproduction--feedback/send-strategic-partnership-board->

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Note: These minutes are subject to approval as a correct record at the next meeting of the Schools Forum on 6 July 2022

Schools Forum meeting held remotely on Wednesday 18 May 2022

To view the archived recording of this meeting, please see here:
<https://bradford.public-i.tv/core/portal/home>

Commenced 08:05
Concluded 10:20

RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

Schools & Academies Members

IN ATTENDANCE

Member	Membership Group
Dianne Richardson (Chair)	Maintained Primary Schools - Headteacher
Ian Morrel (Vice Chair)	Maintained Secondary Schools – Headteacher
Brent Fitzpatrick OBE	Academies Member
Melanie Saville	Academies Member
Helen Williams	Academies Member
Mathew Atkinson	Academies Member
Dominic Wall	Academies Member – Special School Academies
Bev George	Maintained Nursery Schools – Governor
Sian Hudson	Maintained Nursery Schools – Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Graham Swinbourne	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

APOLOGIES RECEIVED

Member	Membership Group
Ashley Reed	Academies Member
Michael Thorp	Academies Member
Victoria Birch	Academies Member
Carol Dewhirst OBE	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Emma Hamer	Maintained Primary Schools – Governor
Nicky Kilvington	Maintained Primary Schools - Headteacher

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Andrew Morley	Academies Member

Deborah Howarth	Academies Member
Heather Lacey	Academies Member
Sir Nick Weller	Academies Member
Wahid Zaman	Academies Member

Non-Schools Members

IN ATTENDANCE

Member	Membership Group
David Johnston	Officer Representing Vulnerable Children
Tom Bright	Teaching Unions

APOLOGIES RECEIVED

Member	Membership Group

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Junaid Karim	Council for Mosques (Bradford)
Gillian Simpson-Morris	Representative of Early Years PVI Members

Substitute Members present at the meeting as a Member (not as an Observer)

Substitute Member	Membership Group

Substitute Members present at the meeting as an Observer (not as a Member)

Substitute Member	Membership Group
Alison Kaye	Academies Member
Michelle Farr	Academies Member – Special School Academies

Local Authority Officers present at the meeting

Officer	Position
Niall Devlin	Assistant Director, SEND and Inclusion
Raj Singh	Business Advisor
Andrew Redding	Business Advisor (Schools)
Asad Shah	Committee Secretariat
Marium Haque	Deputy Director, Education and Learning
Dawn Haigh	Principal Finance Officer (Schools)
Jonty Holden	Principal Finance Officer (Schools)

40% of the School Forum's membership (filled membership positions) must be present for a meeting to be quorate. This meeting was quorate, with 45% of members present (13 out of 29 currently filled membership positions).

618. DISCLOSURES OF INTEREST

Ian Morrel declared interests for agenda items 7, 9 and 10.

619. MINUTES OF 9 MARCH 2022 & MATTERS ARISING

The Business Advisor (Schools) reported on progress made on “Action” items from the 12 January meeting. He reported that:

- The minutes do not record any formal resolutions with items “for action”. However, they do record themes for further discussion, which come back to the Forum within reports to this meeting. This includes the High Needs Block working group (discussing the surplus balance).
- Regarding Item 614, and the request for an impact evaluation of the School Improvement Monitoring and Brokering Grant (SIMB), the Business Advisor is seeking this from the Assistant Director, School Improvement.
- Regarding Item 613, the Assistant Director, SEND and Inclusion, responded to the questions and comments that the Forum asked at the March meeting relating to the 2020/21 Exclusions Report, as recorded in the minutes. He provided some further information on how formula funding, and Pupil Premium Grant, is adjusted following permanent exclusion. He also advised that both Bradford Alternative Provision Academy and Park Aspire offer a small number of ‘step out’ places, for schools to commission directly with these settings. In response, the Chair advised that a member had asked at the March meeting for clarity on how these places can be accessed. The Chair suggested this matter will be included in discussions under agenda items 8 and 9. The Vice Chair agreed, adding that discussions should focus on a necessary review, which he has previously argued for, looking at how ‘step out’ (prevention places) provision is linked to the availability / sufficiency of funding, in that the net cost of such provision on schools is currently quite prohibitive. Within this review, the strategic impact of weighting such provision and funding for early intervention, in the primary-phase, must also be evaluated.

The Business Advisor reported on other matters arising:

- Scheme for Financing Schools April 2022: There were no directed revisions to the Scheme for April 2022 and therefore, our Scheme for maintained schools remains unchanged, except for a minor adjustment to the remove reference to the Salix Loan scheme (which has ceased). The formal adoption of the IRFS 16 reporting standard for leases by maintained schools has now been postponed until April 2024. Guidance is to be provided however, on how authorities can adopt the standard earlier than this.

Resolved –

- (1) That progress made on “Action” items and Matters Arising be noted.**
- (2) That the minutes of the meeting held on 9 March 2022 be signed as a correct record.**

620. MATTERS RAISED BY SCHOOLS

No matters were raised and no resolutions were passed on this item.

621. STANDING ITEM - DSG GROWTH FUND ALLOCATIONS

No allocations for 2022/23 were presented and no resolutions were passed on this item.

622. SCHOOLS FORUM MEMBERSHIP

The Business Advisor (Schools) presented, **Document OI**, which provided an update on the Forum's membership and composition and how the Local Authority will seek to refresh the Forum's membership for the 2022/23 academic year. Members were asked to approve the proposed approach to the election of the Chair and Vice Chair of the Schools Forum. Members were also asked to comment on, and approve, the Forum's Conduct of Meeting and Procedures document for 2022/23 (Appendix 2).

The Academies member, representing Special School Academies, confirmed that Michelle Farr has been elected to replace him as representative.

Forum members did not have any further comments on this report and did not ask any questions.

Resolved –

(1) That the information presented in Document OI be noted.

(2) That the proposed approach to the election of the Chair and Vice Chair of the Schools Forum for the 2022/23 academic year be approved.

(3) That Appendix 2 (Forum Conduct of Meetings and Procedures) for the 2022/23 academic year be approved.

LEAD: Business Advisor, Schools

623. UPDATE ON THE SCHOOLS BLOCK 'HARD' NATIONAL FUNDING FORMULA

The Principal Officer (Schools) presented the report, **Document OJ**, which provided an update on the DfE's published response to the consultation on the completion of the 'hard' National Funding Formula reforms, with changes to be implemented for the 2023/24 financial year.

Forum members did not have any comments on this report and did not ask any questions.

Resolved – That the information presented in Document OJ be noted.

LEAD: *Principal Finance Officer, Schools*

624. MAINTAINED SCHOOLS' OUTTURN (REVENUE BALANCES) 2021/22

The Business Advisor (Schools) presented a report, **Document OK**, which provided an overview of the position of revenue balances held by maintained schools at 31 March 2022.

Forum members did not have any comments on this report and did not ask any questions.

Resolved – That the information presented in Document OK be noted.

LEAD: *Business Advisor, Schools*

625. NATIONAL SEND AND ALTERNATIVE PROVISION REVIEW & CAPITAL SETTLEMENTS

The Business Advisor (Schools), together with the Assistant Director, SEND and Inclusion, presented **Document OL**, which provided an overview of the DfE's SEND and Alternative Provision Review, which was published on 29 March, as well as the Basic Needs and SEND capital settlements for 2022-2024.

In the discussion that followed the presentation of the report, Forum members made the following comments and asked the following questions:

- The member representing Academy Special Schools expressed his concern that Bradford may be excluded from the next wave of SEND free school applications, because we are not currently in deficit. He stated that new school provision is the essential way that high quality holistic learning environments are created. We therefore, need to push back to Government very strongly on this. This was echoed by the Chair, who asked whether the Forum can do anything to raise this issue with the DfE. The Assistant Director, SEND and Inclusion, stated that the Authority is committed to all options for the development of specialist places, including free schools, and that the Authority has already raised our concern with the DfE and ESFA regarding our possible exclusion from the free school wave.
- The member representing Academy Special Schools stated that the SEND Review is incredibly ambitious and, if successful, could change the SEND and AP landscape. There is strong theme in the Review of ensuring, without legislation, that health agencies pay for the health and therapy support services they are responsible for, irrespective of where these services are needed / delivered. If this theme is delivered in full, this will end how schools are currently subsidising the cost of health and therapy services. Locally, we need to start this transition now. The Strategic Director, Children's Services, responded that the Authority is in discussion with health colleagues (ICS systems lead), especially in the context of the creation of specialist places.
- The Assistant Director explained that the DfE's 'solutions', that are expressed within the SEND Review document are: increased standardisation (vs. local

discretion); the re-invention of 'early intervention'; increased partnership; workforce development; increased parental confidence; greater collaboration / co-ordination between SEND and Alternative Provision; return to mainstream inclusion. He emphasised that change in cost is a clear implication of these solutions, especially in the short term, where authorities will be required to invest in early intervention strategies at the same time as meeting the cost of the needs of existing children and young people. These solutions could also mean significant change in costs for schools and for other providers.

- The Vice Chair expressed his view that there is contradiction within the DfE's Schools White Paper, between encouraging innovation and independence, and increasing centralisation and standardisation. He asked whether and how the Authority could be impeded by this. He also asked whether developments in Bradford, including the establishment of the Children's Services Company, provide the opportunity to look at support service delivery innovatively, for example, via the pooling of budgets and staffing resources, the location of health services hubs, the distribution of children's social workers. The Assistant Director responding that the Authority is required to work within a regulatory framework, but he agreed that we need to seek to exhaust the creatively in the system and to work in partnership. This includes the re-design of services. Regarding the movement towards greater standardisation, we need to voice clearly in our response to the DfE's consultation that no child or young person should be 'worse off' as a result of changes, including possible changes in funding levels that may come from the development of a national top-up banding system.
- The member representing the teaching trades unions asked for some further statistics on our numbers of placements in independent provisions. The Chair advised that this information is included in the SEND statements that were been presented to the Forum in December and in March. The Strategic Director added that, although the number of placements has increased in recent years (and therefore, cost has increased), these placements as a % of our schools' population has remain static.

Resolved –

(1) That the information presented in Document OL be noted.

(2) That a letter is sent from the Chair to the Secretary of State to express the Forum's concern regarding the potential exclusion of Bradford from the new SEND free schools wave (on the grounds that our DSG account is not currently in deficit).

LEAD: *Business Advisor, Schools*

626 HIGH NEEDS BLOCK SURPLUS BALANCE DISCUSSION UPDATE

Linking with the previous agenda item on the SEND and Alternative Provision Review, the Business Advisor (Schools) presented a report, **Document OM**, which provided an update on the consideration of the surplus balance that is held within the High Needs Block at the end of the 2021/22 financial year. The report explained the discussions that have taken place with the Forum's Working Group, as well as with the Education and Skills Funding Agency (ESFA), since the last

Schools Forum meeting.

In the discussion that followed the presentation of the report, Forum members made the following comments and asked the following questions:

- A member representing Maintained Primary School Headteachers expressed his disappointment that monies from the surplus balance have not been / are not being injected into schools quickly. He stated that there should be a 4th strand of allocation, with funds being quickly allocated to support children with needs in schools now. The Business Advisor responded that the rationale for the approach that is set out in the report, in the Authority's view, is very clear. This rationale covers the retention of the majority of funds, the targeting of funds to 3 main priority areas, and the Authority's view about not progressing the allocation of funds into schools now in order to further enhance top-up and element 2 funding. The member responded that a 4th strand of allocation would be targeted to support children with needs in schools now.
- The Chair responded to express her frustration, regarding the sufficiency of SEND places, and that a strategic plan for the use of a proportion of the balance towards the 3 identified areas is not yet in place. The Vice Chair added that the Forum members that have attended the working group share a frustration, but there needs to be a clear strategic plan, which is going to take a little more time to develop as it is important to get this right.

Following some discussion on next steps, the timing of the plan, and whether the Forum's working group will meet again, the Forum requested that the Authority presents a plan for the use of the balance (towards the 3 identified areas) to the 6 July meeting, with the working group given the opportunity to meet to contribute to / discuss the plan (including in draft) before this meeting.

The Assistant Director explained that the Authority will seek to respond to this request, but that timescales are short. He emphasised that some of this work is also conditional on receiving advice from the ESFA on the use of High Needs Block funds.

Resolved –

(1) That the information presented in Document OM be noted.

(2) That the Authority presents a plan for the HNB surplus balance to the Forum at the 6 July meeting, with the Forum's sub group to meet in advance of this.

LEAD: Assistant Director, SEND and Inclusion

SCHOOLS FORUM STANDING ITEMS

627.

No further information was presented and no resolutions were passed on this item.

628. AOB / FUTURE AGENDA ITEMS

A member asked whether anything has been announced regarding additional funding to support schools with rising energy costs. The Business Advisor (Schools) responded to advise that, although the DfE has indicated that it is looking at this issue, no announcements have yet been made.

629. DATE OF NEXT MEETING

The next scheduled is Wednesday 6 July. This will be an 'in-person' meeting held at City Hall.

The provisional dates of meetings for the 2022/23 academic year are as follows:

- Wednesday 14 September 2022, 8am
- Wednesday 12 October 2022, 8am
- Wednesday 7 December 2022, 8am
- Wednesday 11 January 2023, 8am
- *Wednesday 18 January 2023, 8am PROVISIONAL MEETING*
- Wednesday 8 March 2023, 8am
- Wednesday 17 May 2023, 8am
- Wednesday 5 July 2023, 8am

Note: These minutes are subject to approval as a correct record at the next meeting of the Forum.

THESE MINUTES HAVE BEEN PRODUCED, WHEREVER POSSIBLE, ON RECYCLED PAPER

Note: This is a briefing note, which has been written following the Schools Forum meeting that was held on 14 September 2022. This meeting went ahead as an informal 'briefing' only, as the meeting took place during the mourning period following the death of Her Majesty, Queen Elizabeth II. No resolutions were made and no decisions were taken. Review / approval of the minutes of the meeting held on 18 May 2022 are moved forward to the next meeting to be held on 12 October.

Briefing Note on the Informal Schools Forum meeting held on Wednesday 14 September 2022

Commenced 08:05, Concluded 11:05

RECORD OF MEETING ATTENDEES, APOLOGIES AND ABSENCES

Schools & Academies Members

IN ATTENDANCE

Member	Membership Group
Ian Morrel (Chair)	Maintained Primary Schools - Headteacher
Ashley Reed (Vice Chair)	Academies Member
Victoria Birch	Academies Member
Wahid Zaman	Academies Member
Brent Fitzpatrick OBE	Academies Member
Melanie Saville	Academies Member
Helen Williams	Academies Member
Amanda Sloney	Academies Member
Richard Bottomley	Academies Member – Alternative Provision Academies
Bev George	Maintained Nursery Schools – Governor
Sian Hudson	Maintained Nursery Schools – Headteacher
Emma Hamer	Maintained Primary Schools – Governor
Graham Swinbourne	Maintained Primary Schools - Headteacher
Kathryn Swales	Maintained Primary Schools - Headteacher
Nicky Kilvington	Maintained Primary Schools - Headteacher
Jonathan Nixon	Maintained Primary Schools - Headteacher
Lyndsey Brown	Maintained Special Schools - Headteacher

APOLOGIES RECEIVED

Member	Membership Group
Heather Lacey	Academies Member
Mathew Atkinson	Academies Member
Michelle Farr	Academies Member – Special School Academies

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
Andrew Morley	Academies Member

Michael Thorp	Academies Member
Kirsty Ratcliffe	Pupil Referral Unit (maintained)

Non-Schools Members

IN ATTENDANCE

Member	Membership Group
Tom Bright	Teaching Unions

APOLOGIES RECEIVED

Member	Membership Group

NOT IN ATTENDANCE (WITHOUT APOLOGIES RECEIVED)

Member	Membership Group
David Johnston	Officer Representing Vulnerable Children
Junaid Karim	Council for Mosques (Bradford)

Substitute Members present at the meeting as a Member (not as an Observer)

Substitute Member	Membership Group

Substitute Members present at the meeting as an Observer (not as a Member)

Substitute Member	Membership Group
Alison Kaye	Academies Member

Local Authority Officers present at the meeting

Officer	Position
Andrew Redding	Business Advisor (Schools)
Asad Shah	Committee Secretariat
Jonty Holden	Principal Finance Officer (Schools)
Marium Haque	Strategic Director, Children's Services
Niall Devlin	Assistant Director, SEND and Inclusion
Debbie Cousins	Senior Finance Officer

Observers

Name
Cllr M Pollard

40% of the School Forum's membership (filled membership positions) must be present for a meeting to be quorate. This meeting was quorate, as 66% of members were present (18 out of 27 currently filled membership positions).

At the beginning of the meeting, the new Chair of the Schools Forum (Ian Morrel) explained that this meeting is going ahead as an informal briefing. The Chair led the Forum for a minute's silence, as a mark of respect for Queen Elizabeth II.

The Chair welcomed 3 new members to the Schools Forum (Jonathan Nixon, Amanda Sleney and Michelle Farr).

The Chair then made an opening statement. This statement is a very helpful point of reference for Forum members and so is recorded below:

“In taking over the role of Chair, I said to Andrew (*Redding – Schools Business Advisor*) that I want to make a Chair’s Statement, which I hope will be of benefit to both long-standing and new members, the purpose of what I will say is to help ‘set the scene’ for the work that we do as members of Schools Forum and to briefly outline the challenges we and school leaders will face over the next financial and academic years.

I wish to remind us all that we are representatives of sectors from across all the education sectors in Bradford and, as such, we have a responsibility to make sure we represent their views, to keep them informed of the points we discuss, and to ensure that the information that is produced by Andrew Redding and his team is effectively communicated to them. Also, to appreciate the challenges different sectors have, and that we have always worked together to support each other over the years. The next few years are likely to challenge our resolve even further. The guiding principle of our work is that the large amounts of funding we discuss is money that should always be to the benefit of children and young people – simply put, the money should follow the child. At times it may feel to us that this is not the case, and we have the right to make challenges. However, it is important that, in engaging with the discussion, we keep the focus that we are representatives of sectors and should not be making a case just for our own schools and colleges. At times we may feel conflicted, either because we know our institutions may benefit from a strategic decision and/or from some financial gain or loss due to a proposal or a decision being made, which is why procedure allows us to make declarations of interest and feel confident to engage fully in discussion and debate. Over the years, I have been keen that our discussions also focus on Strategies for education development across the District and that our work supports recommendations to those who have responsibility within the Council to implement strategy. This allows us to see if funding is having impact and to be able to hold members of the Council accountable – for me, this is a key part of what we have responsibility for.

I want to add that, as is inevitable, changes in membership mean that being a member of Schools Forum can seem daunting, not least because new members think everyone else knows what is being discussed – I can assure you that this is not always the case; discussions use terminology that not everyone will grasp – please, all members, ask if you do not understand the terminology or the point being discussed. We rely so much on the expertise of Andrew Redding and his expert team, in whom we know we can trust to help steer us through challenges, but they will make reference to matters such as Minimum Funding Guarantee and Headroom and Floors, for example, which we all need to understand for our own benefit and that of colleagues for whom we represent.

To ‘set the scene’ for 2023/24:

- We expect to follow our usual timetable for the 2023/24 Dedicated Schools Grant (DSG) and formula funding cycle. Today's meeting, and then meetings in October and December, will prepare the way for the Forum to make its recommendations on 11 January. Today's meeting represents the starting point for discussions on the 2023/24 cycle. However, we will need to move quickly to formal consultation, beginning as usual mid-October.
- We were warned in the July meeting that we are likely to find the 2023/24 budget round challenging. This is not so much because of technical changes that we will be required to manage, but because we will find that the 2023/24 financial settlement is not at the level of recent years, the amount of budget headroom that we have will have reduced, and the financial position of our High Needs Block will worsen. It will be challenging also in respect of how the increases in funding for schools, academies and other providers (including early years' providers), that can be afforded by the 2023/24 settlement, compare with the current scale of growth in costs, especially as a result of pay awards and inflationary pressures. The Council will begin to present to today's meeting further details on the 2023/24 settlement, and the view that this year's cycle will be 'challenging' is very much confirmed – income does not always appear to match expenditure.
- One of the key messages for all schools and academies to take note of is the immediate need to review and update their 2022/23 financial year budgets, as well as their 3-year budget forecasts, for the latest available information on pay awards, costs and formula funding projections. Most schools and academies will find that their budget positions have changed (and most possibly have worsened) since original forecasts were produced earlier in the year. Andrew Redding and his team will shortly publish a 'key messages' summary on Bradford Schools Online, for schools and academies to access. It is also intended to publish shortly some early indicative modelling, in advance of formal consultation documentation, which will allow primary and secondary schools and academies to see more clearly what 2023/24 formula funding might look like.
- Now, it might be at this point that all new members think 'why on earth did I sign up to be a member of Schools Forum' and existing members may think 'my resignation is writing itself! But, I have been a member of Schools Forum for many years and have relished the challenge and enjoyed the debates, discussions and decision-making, because we care what happens to the children and young people of the Bradford District. So thank you for being a member of such an important body and let's work together and enjoy the challenge of making ends meet."

1. Declarations of Interest

Emma Hamer declared an interest in all matters concerning the High Needs and Early Years Blocks.

Ian Morrel, Lyndsey Brown and Richard Bottomley declared an interest in High Needs Block matters.

2. Minutes of the 18 May Schools Forum Meeting and Matters Arising

The minutes of the meeting 18 May 2022 have been moved forward for review / approval at the next meeting to be held on 14 September. The Business Advisor (Schools) reported the following, for information:

- As we have done in previous years, we would like to warn primary-phase maintained school representatives that, because of the timescales needed to confirm subscription, Members will be asked at the next meeting on 12 October whether they wish to de-delegate for the purposes of subscribing to Fischer Family Trust next year. As such, it will be helpful for them to have collected feedback from colleagues in advance of this. We will send an email to members following this meeting to help with this.
- Within the agenda reports pack is a confirmed statement of Dedicated Schools Grant (DSG) balances brought forward from the 2021/22 financial year. This statement replaces what was presented to the Forum in July. The only change in the confirmed statement is the balance held within the Early Years Block, which is now amended (increased by £0.287m) for the DfE's final Early Years Block figure.
- Also within the agenda reports pack is a statement, which aims to summarise the main points regarding the latest pay award information for teachers and for support staff. This is presented to ensure that Forum members are aware of this information, and also because it provides context for the information about the 2023/24 funding settlement, which will be presented through the agenda of this meeting.
- The Government made an announcement on 8 September, indicating that there will be energy costs protection for the public sector – a '6-month energy guarantee'. The details of this (and as this affects schools specifically) are not yet clear, but we will highlight on Bradford Schools Online the further detail when this comes.
- The new Prime Minister stated in her 'manifesto' that the recently introduced additional 1.25% National Insurance Levy will be removed. If it is confirmed that this will be removed for employers, this will provide some budget relief for schools, academies and other providers. The details (and timing) are currently not clear, but we will highlight on Bradford Schools Online the further detail when this comes.

In response to these information items, Forum members asked the following questions and made the following comments:

- Previously, when the teacher pay award was higher than 'expected', the DfE provided more funding in the form of an additional grant. Has the DfE indicated that more funding will be allocated this year? The Business Advisor (Schools) responded that recent messaging from the DfE indicated that no further funding would be allocated

(that pay awards must be met from existing school budgets). The DfE refers to the Schools Supplementary Grant, which has been additionally allocated this year to support the NI Levy as well as pay award costs more generally. The position may change (with the new Prime Minister and the budget (fiscal) statement to be made this month), but the DfE has not so far indicated that additional funding will be available.

- A member asked the member representing the Teacher Trades Unions whether there is any further information released from the Unions about their positions in respect of the teacher pay award? The member responded that the Unions are clearly very disappointed with the teacher pay award, but are also livid with the Government that no additional funding has been provided to meet its cost. The Unions are lobbying the Government hard about this. A ballot of Union members on the pay award is taking place towards the end of this month.
- What would the position be if schools and academies cannot balance their budgets? The Business Advisor made a few comments in response to this. Firstly, that the 'bottom line' requirement of all schools and academies is to set a balanced budget, irrespective of any view about the 'adequacy' of funding, which would be taken up with Government via lobbying and via consultation responses. He accepted that this response does not provide much comfort, but it is a reality of the school finance system. Ultimately, the back stop for maintained schools is Bradford Council. For academies, this is the ESFA / the DfE. The Council will always seek to support, guide and advise schools in their budget management. It is appropriate however, to emphasise the extent of the financial challenge that is currently facing Bradford Council. The extent to which the Council could directly support schools financially is extremely limited (to say the least). Cllr Pollard, attending the meeting as an observer, reiterated this message. He highlighted that schools nationally are currently (at the end of the 2021/22 financial year) holding larger reserves, meaning that the immediate budget challenge is an 'in year' one. He also emphasised that the situation regarding increases in costs (from inflation, energy prices etc) is fluid.
- Do governors and trustees have any personal liability here? The Business Advisor responded that, to the best of his knowledge, neither governors of maintained schools nor trustees of academy trusts hold personal liability in respect of a school's or an academy's financial position (a failure to set a balanced budget).

3. Matters Raised by Schools

It was reported that no matters have been raised.

4. Standing Item – DSG Schools Block Growth Fund Allocations

The Chair advised that no allocations are presented to the Schools Forum for approval.

5. DfE Consultation on Early Years Block Funding

The Business Advisor (Schools) presented a report, **Document OS**, which briefed the Schools Forum on the DfE's consultation on the Early Years Block for 2023/24 and on the

implications of the DfE's proposals for the funding of providers delivering the early years entitlements, as well as for our Early Years Block management.

The report also provided the Local Authority's response to this consultation, which has been submitted.

The Business Advisor explained that the proposed Early Years Block settlement for 2023/24 is the beginning of 'financial challenge' message. Under the DfE's proposals, we would only see a 1% increase in our funding rates. The 'inadequacy' of this uplift is a main point of our response to the DfE. The Business Advisor explained that there are likely to be complications, and knock on consequences, that we will need to work through, where the decision is taken by the DfE to merge Teacher Pay and Pensions Grants into the Early Years Block in 2023/24. We will shortly reconvene the Early Years Working Group (EYWG) to consider the detail of this and of our Early Years Single Funding Formula arrangements.

The Business Advisor asked for any members that are interested in attending the EYWG to contact him directly.

Forum members did not ask any questions and did not have any comments on this report.

6. Schools Block 'Hard' National Funding Formula – DfE Consultation

The Principal Finance Officer (Schools) presented **Document OT**, which gave the Schools Forum sight of the Local Authority's response to the DfE's latest consultation on the transition to the 'hard' National Funding Formula within the Schools Block.

The deadline for responses was 9 September and the Principal Finance Officer explained that the Authority has submitted a response. He then highlighted the key aspects of this response.

Forum members did not ask any questions and did not have any comments on this report.

7. 2023/24 DSG & Formula Funding Announcements – Briefing

The Business Advisor (Schools) and the Principal Finance Officer (Schools) presented **Document OU (Appendices 1, 2 and 3)**, which provided a briefing on the 2023/24 Dedicated Schools Grant settlement and formula funding arrangements, following the DfE's announcement on 19 July 2022.

The Business Advisor presented Appendix 1 point by point. He explained that the financial challenge that the 2023/24 settlement presents, across the Schools, Central Schools Services, and High Needs Blocks, is significant. He confirmed that the national 3-year funding settlement (2022-2025), that was announced in October 2021, has been weighted towards 2022/23, with reduced increases in 2023/24 and (expected) in 2024/25. He explained that, whilst this approach has increased funding levels (and the spending power) that are available now, which is a significant positive, in the context of the current scale of increasing costs, schools, academies and other providers are likely to see a quite substantial erosion in their spending power during 2022/23 and into 2023/24 if no further funding is allocated and if costs continue to increase.

The Principal Finance Officer presented Appendix 3 - graphs intended to better highlight the distribution of the Schools Block settlement, and the 'relative winners and losers', including highlighting the differences between the primary and secondary phases. He explained that, due to the primary phase being more reliant on the Minimum Funding Levels (MFLs) and Minimum Funding Guarantee (MFG), the 2023/24 settlement for the primary phase is generally more challenging than for the secondary phase. The Business Advisor highlighted that the uplift in the MFLs and MFG of only 0.5% is one of the most challenging aspects of the 2023/24 settlement (as schools and academies that are funded on these factors will see only a 0.5% increase in their funding per pupil). The uplifts in the MFG and MFLs in recent years have been higher and most schools and academies will likely have estimated a greater than 0.5% increase in their funding in 2023/24.

Within the presentation of the challenges within the High Needs Block, the Assistant Director, SEND and Inclusion, presented some outline statistics, which emphasise how significant the increase in the numbers of EHCPs, and assessment requests for EHCPs, in the Bradford District has been (and continues). In 2019, Bradford District had 2,397 children and young people with EHCPs. The number of EHCPs currently is 5,288. The Authority currently receives (on average) 160 new EHCP applications per month.

Responding to the presentation of the report, Forum members asked the following questions and made the following comments:

- Who pays for the Minimum Funding Guarantee (where is the cost top-sliced from)? The Business Advisor explained that, within the Schools Block settlement, the DfE has funded a minimum 0.5% increase in funding per pupil for all schools and academies. This means that an MFG of 0.5% is funded, rather than being a call on other elements within the Schools Block. The cost of the MFG at the moment within our 2023/24 model is £1.8m.
- It was confirmed that the secondary school showing as a negative in Appendix 3 is the result of a 'statistical anomaly' relating to the nature of the school as a newly established school, and that this isn't indicative of a negative settlement for this school.

8. Outline – Formula Funding Arrangements & Consultations

The Business Advisor (Schools), and the Principal Finance Officer (Schools), presented **Document OV**, which outlined the working principles that are being considered in the development of Bradford's formula funding arrangements for 2023/24 for the Schools and High Needs Blocks.

At the start of the item, both the Chair and the Business Advisor provided a summary of key points so far, and sought to re-assure the Forum that there will be opportunity for members to understand and to better absorb these messages. For this purpose, the Business Advisor reminded members that 3 FFWG sessions have been arranged, and he encouraged members to book onto one of these.

The Business Advisor and the Principal Finance Officer then explained that they have developed a 'worked-through' formula funding approach for 2023/24, which follows established principles and which is likely to form the basis of what the Authority consults on (and what will be discussed with members within the FFWG meetings). A short

summary of the key aspects of this formula funding approach was presented. The Business Advisor also explained that, on current modelling, it is anticipated that approximately (very estimated at this stage) £8m of DSG reserves could be needed to afford our 2023/24 planned budget, without further 'mitigating' actions being taken to reduce spending. This position is after having 'exercised restraint' in uplifting formula funding within the High Needs Block (restricting uplifting rates of top-up funding to 1%). He emphasised that the Authority and the Forum have 2 levels of 'financial challenge' to consider and to balance: the challenge at individual school, academy and provider level (in relation to their expenditure in 2023/24 increasing at a rate greater than income, putting pressure on the Authority and the Forum to maximise delegated funding); and the challenge at DSG level, in setting formula funding arrangements for 2023/24 that are affordable and sustainable within the value of DSG funding that is available to the District. The Business Advisor stated that meeting the cost of new specialist places, and meeting the cost that has arisen from the recent and continued growth in the number of EHCPs, were the priorities for the High Needs Block in 2023/24.

In response to the presentation of the report, Cllr Pollard asked for clarification on whether any of the £3.8m that is stated as estimated for the cost of new specialist places was capital or could be capitalised. The Business Advisor responded that the £3.8m was only the revenue funding associated with the on-going cost of the new places (place element and top up funding), and did not include any capital costs associated with new building or the adaption of buildings. Forum members did not ask any further questions, and did not raise any further comments, on this report.

9. Work Programme and Schedule of Meetings 2022/23 Academic Year

The Business Advisor (Schools) presented **Document OW**, which outlined the School Forum's 2022/23 Academic Year work programme. He asked members to review this programme and to contact him if members identify any significant additional matters they feel should be discussed. Members did not make any comments or ask any questions on the programme within the meeting.

The Chair emphasised how important it is for members to attend Forum meetings and requested that members prioritise this.

10. Schools Forum Standing Items

Nothing further was reported.

11. AOB / Future Agenda Items

The Chair raised two items of additional business:

- Do we have information available yet on the numbers of admissions applications that are to be placed before the October Census? The Chair is concerned to ensure that the number of placements before the Census is maximised (to secure the funding for 2023/24) and, if there are any difficulties, that these are flagged and resolved. The Strategic Manager, Sufficiency, and the Assistant Director, SEND and Inclusion, responded that this is discussed weekly by the Children's Services management team

and that no issues are currently being flagged. The Business Advisor (Schools) stated that we normally provide a statement on 'placement by the October Census' to the Forum in October and that we plan to present this at the next meeting.

- What are the Council's strategies for supporting households with the 'cost of living crisis' and can the Council signal for schools the guidance that is available? This will help schools in talking to parents. The Business Advisor responded that he will follow this up, including to highlight through Bradford Schools Online the Council's guidance on support mechanisms, which is believed to already be on the Council's website.

12. Next meeting

Please see the published schedule of meetings – the next Forum meeting is scheduled for Wednesday 12 September, to take place in person at City Hall.

SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks the Forum to consider the consultation document, which outlines the proposals for the Schools Block, for the formulae to be used to calculate allocations for Primary and Secondary schools and academies for the 2023/24 financial year and the criteria that will form the basis of the allocation of additional funding to maintained schools (and academies where appropriate) from DSG centrally managed funds.

Date (s) of any Previous Discussion at the Forum

A report outlining the developing proposals for 2023/24 funding arrangements was presented to the Schools Forum on 14 September.

Background / Context

Please see Appendix 1 (the consultation document itself).

Details of the Item for Consideration

Each autumn the Local Authority, with the agreement of the Schools Forum, publishes three separate consultations on DSG management and formula funding arrangements for the following year.

Appendix 1 represents the formal consultation document on Schools Block arrangements for 2023/24. This consultation presents proposals for the formulae to be used to calculate budget shares for primary and secondary schools and academies, for the criteria to be applied in the allocation of the Growth Fund and other Schools Block centrally managed funds, and asks for feedback on the position of de-delegated Schools Block funds.

Forum Members are not asked to give their final views (final recommendations) for 2023/24 at this meeting. Members are asked to approve the publication of the documentation for consultation. The Forum will be asked to review responses to this consultation in December prior to making final recommendations on 11 January 2023.

Implications for the Dedicated Schools Grant (DSG) (if any)

As set out in Appendix 1.

Recommendations

The Schools Forum is asked to agree that the consultation document (Document OX Appendix 1) is published.

List of Supporting Appendices / Papers (where applicable)

Appendix 1a – Primary and Secondary 2023/24 Formula Arrangements Consultation
Appendix 1b1 and 1b2 – Modelling (main modelling and modelling of the Notional SEND Budget change)

Contact Officer (name, telephone number and email address)

Jonty Holden, Principal Finance Officer (Schools)
01274 431927
jonty.holden@bradford.gov.uk

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Document OX App 1a CONSULTATION & INFORMATION ON MAINSTREAM PRIMARY & SECONDARY FORMULA FUNDING 2023/24 FINANCIAL YEAR

1. Introduction

1.1 This document sets out the Authority's proposals for:

- The calculation of budget shares for mainstream primary (reception to year 6) and secondary (year 7 to year 11) maintained schools and academies in Bradford for the 2023/24 financial year (the "funding formula"). For those who may not wish to read the full detail of this document, an extended summary of the formula funding proposals is given in paragraph 3.
- The criteria to be used to allocate additional amounts from centrally retained funds within the Schools Block of the Dedicated Schools Grant (DSG), including from the Growth Fund and from the Falling Rolls Fund.

1.2 This document also asks for feedback on the continuation for the 2023/24 financial year of funds de-delegated from maintained mainstream primary and secondary schools. **Please be aware however, that, due to the timescale necessary for confirmation, the Schools Forum has already decided to continue / discontinue de-delegation in 2023/24 from mainstream maintained primary schools for the purposes of subscribing to Fischer Family Trust.**

1.3 The deadline for responses to this consultation is **Tuesday 29 November 2022**. An analysis of responses received will be discussed at the Schools Forum meeting on 8 December. Please address all questions and responses to Jonty Holden 01274 431927 jonty.holden@bradford.gov.uk. A response form is included at Appendix 4. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response. Please access the web-based questionnaire [here](#).

1.4 Please note that separate consultation documents, on Early Years Block and High Needs Block formula funding arrangements for 2023/24, will be published on Bradford Schools Online. These consultations will be signposted from our latest news and updates page [here](#).

2. Background

2.1 It is important to confirm, for mainstream primary and secondary schools and academies, that the Minimum Funding Guarantee (MFG), and the DfE's mandatory Minimum Levels of Per Pupil Funding (MFLs), remain in place in 2023/24. These factors protect individual schools and academies against sharp reductions in per pupil funding in any single year, that may be caused by technical formula or by October Census data changes, and provide for a minimum value of per pupil formula funding. The values of the MFLs for each phase are set nationally by the DfE, and are mandatory, but the level of the MFG is one of the key decisions that we must take locally.

2.2 In their most recent three-year budget forecasting, maintained primary and secondary schools will typically have budgeted in 2023/24 for a 'headline' increase of 2.00% per pupil in core formula funding and for a Minimum Funding Guarantee (MFG) of positive 1.50%. Schools affected by the mandatory Minimum Levels of Per Pupil Funding (MFLs) will typically have estimated that these minimums will increase by 2.00%. We are aware that a number of academies in Bradford follow the Authority's guidance in estimating their future year formula funding.

2.3 The actual 2023/24 settlement, provided through the National Funding Formula (NFF), and as announced by the DfE in July 2022, is confirmed as follows. The basic 'headline' settlement is close to the Authority's estimates. However, the Minimum Levels of Per Pupil Funding (MFLs), and the Minimum Funding Guarantee (MFG), are set lower than estimated.

- The national Schools Block settlement for 2023/24 provides for an overall 1.9% increase on 2022/23 in funding per pupil. This scale of increase aligns with our previous assessment, that the current 3-year national school funding settlement has been weighted towards 2022/23, with reduced increases to be allocated by the DfE in 2023/24 and in 2024/25.
- Unlike in recent years, rather than a single % increase being applied to all NFF factors, the FSM6 (Free School Meals Ever 6) and Income Deprivation Affecting Children Index (IDACI) factors have been additionally uplifted. This weights the 2023/24 settlement towards schools and academies with higher levels of deprivation, as measured by FSM6 and IDACI. As a result, schools and academies, that are funded above the levels of the MFL and MFG, will typically see per pupil funding increases in the region of 2.6% in 2023/24, which is higher than the overall aggregated 1.9%.
- The national Schools Block NFF per pupil increase of 1.9% is aggregated as follows:
 - The core NFF factors (AWPU and lump sum) are increasing by 2.4%.
 - The deprivation NFF factors (FSM6 and IDACI) are increasing by 4.3%.
 - All other NFF factors are increasing between broadly 2.1% and 2.6% (after the variable values have been rounded to the nearest £5).
 - The mandatory Minimum Levels of Funding Per Pupil (MFLs) are increasing by 0.5%.
 - The Minimum Funding Guarantee (MFG) can be set at a maximum 0.5%. The DfE has funded a 0.5% minimum floor increase for all schools and academies.
- After applying the basic % uplifts, the DfE has further increased the AWPU, FSM6 and lump sum factors in order to allocate the Schools Supplementary Grant (SSG) via the National Funding Formula. The SSG was a new grant, introduced at by the DfE April 2022, to support the costs of pay awards and the 1.25% NHS / Social Care National Insurance Levy. The MFLs have been uplifted to allocate the SSG. SSG allocations have also been added into school and academy baselines, so that the Minimum Funding Guarantee will provide protection, which is inclusive of the SSG allocations was were received separately in 2022/23. On this basis, mainstream primary and secondary schools and academies must now cease to budget for the SSG as a separate additional allocation. All schools and academies should carefully check their 2023/24 budget scenarios (including any scenarios that are continued from existing ones) to ensure that they are not double counting the SSG. For wider awareness, please note that the small proportion of Schools Supplementary Grant, that has been allocated in respect of early years and post 16 pupils, will continue to be allocated as a separate grant in 2023/24. It is the Reception to Year 11 element of the SSG that has been merged into core NFF formula funding for the 2023/24 financial year.
- The Minimum Levels of Per Pupil Funding (MFLs) for 2023/24 are £4,405 (primary – increased from £4,265) and £5,715 (secondary – increased from £5,525). These are the minimum values of per pupil funding that schools and academies must receive in 2023/24. These minimums continue to be mandatory and are therefore, not subject to local consultation. An important point to highlight is that the uplift of the MFLs in 2023/24 is significantly lower than the uplift of the core NFF factors – the core NFF factors (AWPU and lump sum) are increasing by 2.4% but the MFLs are increasing by only 0.5% (both figures are prior to the transfer of Schools Supplementary Grant). Schools and academies that are funded on the MFLs will only receive a 0.5% increase in their funding per pupil in 2023/24. This is very likely to be lower than the increase that these schools and academies will have forecasted (2.00%), based on the DfE's 2022/23 approach to uplifting the MFLs in line with the increase in the core factors.
- The Minimum Funding Guarantee can be set between 0% and positive 0.5% in 2023/24. This permitted range is much narrower than in 2022/23, and the maximum of 0.5% is also much lower than the maximum 2.0% that could be set in both 2021/22 and 2022/23. This means that the gap between the MFG and the increase in the core NFF factors is much greater in 2023/24 than it was in both 2021/22 and 2022/23. Schools and academies that are funded on the MFG will only receive a maximum 0.5% increase in their funding per pupil in 2023/24. As with the MFL schools, this is very likely to be lower than the increase that these schools and academies will have forecasted (1.5%), based on the DfE's approach in the last 2 years to setting the minimum and maximum MFG levels.

- The positions and values of the remaining long-standing recurrent separate mainstream pre-16 additional grants in 2023/24 – Pupil Premium Grant, Primary PE & Sports Premium and Universal Infant Free School Meals – are still to be confirmed. DfE announcements on these grants, when they come, will be signposted on Bradford Schools Online.

2.4 We are in an extended period of system change, one of the most significant changes being the movement towards a ‘hard’ National Funding Formula (NFF) for the calculation of mainstream primary and secondary core formula funding allocations. The DfE has for some time stated that its longer-term intention is to transition to a ‘hard’ formula approach, where school and academy formula allocations will be calculated by the DfE, rather than by local authorities, using the National Funding Formula. The DfE first introduced the National Funding Formula (NFF) in 2018/19 in ‘soft’ format, meaning that local authorities can currently still decide the formulaic calculations that are used for distributing funding to mainstream primary and secondary schools and academies within their areas, albeit within tight Regulations. Local authorities continue to set their own Growth Fund and Falling Rolls Fund arrangements. There currently are also elements that are not yet covered by the NFF, the most prominent of these being the funding of PFI (Building Schools for the Future) and of split sites.

2.5 The DfE has just completed another stage of consultation, on the final transition to the hard NFF. Although there isn’t a fixed date for when this will be implemented, the DfE sets out the aim for full implementation within the next 5 years - by 2027/28 at the latest; sooner if possible, but no later. Changes have been directed by the DfE for the 2023/24 financial year, which are incorporated into this consultation. The DfE then already proposes to make targeted changes to the NFF for the 2024/25 financial year, which we will incorporate into our consultation this time next year. These include a new mandatory NFF factor for split sites funding and the amendment of Growth Fund and Falling Rolls Fund arrangements. We are also conscious that the current national SEND and Alternative Provision Reviews are very likely to have implications for mainstream formula funding, with changes possibly introduced from April 2024. The DfE has also indicated that the construction of the NFF will continue to be reviewed annually.

2.6 In the context of this transition, we wish to continue to ensure that we take an approach now to formula funding that will minimise any turbulence that might be caused by the final stages of the transition in the near future. Further announcements and consultations, at a detailed level, will be required in order for us to have a clearer understanding of the medium to longer term impact of further NFF reform on the funding of individual mainstream primary and secondary maintained schools and academies in Bradford. Due to the DfE setting out proposals for a gradual approach, the timing of the final movement to the hard NFF is still uncertain. What the NFF will look like post-transition is also uncertain. We might perhaps expect this to be similar to the NFF as currently constructed, using similar factors, values, and protections. However, whilst it has been confirmed that the Minimum Funding Guarantee will continue, the DfE has stated that many elements and factors of the National Funding Formula are under review. More recently, the DfE has clearly indicated that the NFF development will be heavily influenced by the final outcomes of the current national SEND and Alternative Provision Reviews. This includes the definition of Notional SEND budgets within mainstream formula funding allocations, for which the DfE has recently provided further guidance.

2.7 There are two directed changes, which affect our 2023/24 formula funding arrangements:

- For mainstream primary and secondary formula funding, authorities must now use all National Funding Formula factors, and only these factors. Authorities that do not currently ‘mirror’ (fully use already) the NFF must move 10% closer. Authorities that currently mirror the NFF must continue to do so by staying within 2.5% of the NFF formula factor variable values. As Bradford already directly mirrors the NFF, this new restriction requires minimal response within our arrangements for 2023/24. However, this does restrict the extent to which we could move away from the NFF, either to allocate additional funding (via budget headroom, where available) or to reduce the cost of our formula funding arrangements in order to secure their affordability.
- We are now formally required to add the National Funding Formula ‘sparsity factor’ into our local formula. However, this is a ‘tick box’ exercise only, as none of our schools / academies qualify for sparsity funding. Although a very small number trigger the ‘sparse’ part of eligibility for this funding (as these schools / academies are at least 2 miles (primary) or 3 miles (secondary) distance by road away from their nearest school / academy), none are small enough to trigger the ‘size’ part of eligibility for this funding.

2.8 Other than these directed changes, there is a great deal of continuity in 2023/24:

- The factors that were not included in National Funding Formula in 2022/23 are still not included e.g. split sites, PFI. Although changes will be made for 2024/25, we continue to set these factors locally in 2023/24.
- The construct of the National Funding Formula is the same as it was in 2022/23, incorporating the same factors and how these are applied.
- The Minimum Levels of Per Pupil Funding (MFLs) are still in place and continue to be mandatory. The Minimum Funding Guarantee (MFG) is also still in place.
- Local authorities continue to have the flexibility to set their own Growth Fund and Falling Rolls Fund mechanisms, but must still comply with DfE's guidance, which has not changed.
- The existing framework for the de-delegation of funding from maintained schools continues unchanged.
- Although the DfE has provided new guidance on Notional SEND, this guidance stops short of prescribing local arrangements. Authorities continue to have full flexibility to define their own Notional SEND budgets. There are also no changes in operational guidance, which alter the way SEND funding works for mainstream schools and academies in 2023/24 e.g. the £6,000 threshold (element 2) is still £6,000.
- We will need to continue to absorb the cost of the 'lag' in data. In 2023/24, this will be the lag between the funding of schools / academies on October 2022 Census data and the funding of the Dedicated Schools Grant (DSG) Schools Block on October 2021 Census data.
- We will need to continue to manage the cost of Business Rates (NNDR), including the impact of re-evaluation at April 2023.
- Local authorities continue to be permitted to use the Reception Uplift Factor, on an optional basis.

2.9 To give context to the proposals that we put forward now for 2023/24, it is helpful to summarise briefly the key decisions that we have taken at and since this date:

- In 2018/19, we replaced our local formula with the DfE's National Funding Formula, using this to calculate individual formula allocations for both primary and secondary phases. We have continued this 'mirroring' policy in each year since, adopting annual incremental changes in the NFF construction and uplifts in formula variable values. The DfE established a new pupil mobility NFF factor in 2020/21, which, following a year of transition, we fully adopted for both primary and secondary phases. We have also adopted, as required, the Minimum Levels of per Pupil Funding (MFLs).
- We have set a Minimum Funding Guarantee (MFG - protecting / ensuring a minimum increase in individual maintained school and academy per pupil funding year on year) as follows. For the last 3 years, we have set our MFG with reference to the maximum level that was permitted by the Regulations:
 - 2018/19 at positive 0.40% per pupil
 - 2019/20 at 0% per pupil
 - 2020/21 at positive 2.34% per pupil
 - 2021/22 at positive 2.00% per pupil
 - 2022/23 at positive 2.00% per pupil
- Since 2018/19, we have not applied a ceiling, which would have capped the values of annual increases in per pupil funding received by individual maintained schools and academies. All formula funding gains, from annual data changes, have been passed through to maintained schools and academies.
- We have not transferred monies from the Schools Block to the High Needs Block since 2019/20. In setting the Minimum Funding Guarantee at positive 2.34% in 2020/21, which was 0.5% higher than permitted under the normal regulations, our intention was to 'give back' to mainstream schools and academies the money we transferred in 2019/20.

- We have retained unchanged our local approaches in the areas of formula funding that the DfE's NFF does not yet cover. These are:
 - Business Rates (actual cost).
 - Split sites.
 - PFI (Building Schools for the Future).
 - Growth Fund (at individual school level).
 - Falling Rolls Fund.
 - Notional SEND definition.

2.10 The combination of a number of changes and decisions since 2017/18 – transfer from the Schools Block to the High Needs Block in 2017/18 and in 2019/20, our mirroring of the DfE's National Funding Formula, year on year changes for individual schools and academies in the data recorded in / sourced with reference to the pupils recorded in their annual October censuses, the DfE's mandatory Minimum Levels of per Pupil Funding - has created the following landscape in Bradford in 2022/23:

- Primary phase: 67 out of 156 schools and academies (43%) are funded on the Minimum Funding Guarantee. 34 schools and academies (22%) are funded at the £4,265 minimum per pupil level. All other schools and academies are funded above £4,265 per pupil.
- Secondary phase: 5 out of 31 schools and academies (16%) are funded on the Minimum Funding Guarantee. 2 schools and academies (6%) are funded at the £5,525 minimum per pupil level. All other schools and academies are funded above £5,525 per pupil.
- All through academies: 1 out of the 4 academies (25%) is funded on the Minimum Funding Guarantee. All of these academies are funded above their composite minimum per pupil funding levels.
- In total, 73 out of 191 schools and academies (38%) are funded on the Minimum Funding Guarantee. This is reduced from 109 (57%) in 2021/22. In total, 36 out of 191 schools and academies (19%) are funded on the minimum per pupil funding levels. This is reduced from 43 (23%) in 2021/22.

2.11 As a final point of reminder, and for awareness, our separate consultation on High Needs Block formula funding presents the Local Authority's proposals for the funding of pupils with Education Health and Care Plans in mainstream settings in 2023/24. This consultation is signposted from our latest news and updates page [here](#), and includes proposals for allocating top-up funding and for the SEND Funding Floor. We discuss within this consultation here, as well as within the High Needs Block consultation, the proposed amendments to the definition of Notional SEND budgets.

3. Formula Funding Proposals for 2023/24

3.1 There are **7 key decisions** we need to take on Bradford's 2023/24 mainstream primary and secondary Schools Block funding formula arrangements. These decisions are similar to those that were needed for 2022/23.

3.2 The 7 decisions are:

1. Whether we transfer budget from Schools Block to the High Needs Block and, if we do, the value of this transfer.
2. Whether we continue to fully mirror the DfE's National Funding Formula (NFF).
3. The value (% level) of the Minimum Funding Guarantee, which can be set between 0% and positive 0.5%.
4. Whether we continue our existing local approaches to the factors that are still not covered by the National Funding Formula.

5. In light of the DfE's new recent guidance, whether we continue our existing approach to the definition of Notional SEND budgets, or whether we now take steps to review and to incrementally adjust this definition in the movement towards the 'hard' NFF.
6. How we would amend our mainstream primary and secondary funding formula, if necessary for affordability reasons, should the total cost of our formula substantially increase (and be unaffordable) when the October 2022 Census dataset is used.
7. Whether we retain, with their existing criteria and methodologies, the funds currently managed centrally within the Schools Block.
 - a. Growth Fund
 - b. Falling Rolls Fund (primary phase)
 - c. Funds de-delegated from mainstream maintained primary and secondary schools

3.3 Please be aware that the values of the primary and secondary phase Minimum Levels of Funding per Pupil (MFLs) are mandatory and not for local determination. We are not consulting on the application of the MFL factor.

3.4 Running alongside our 7 decisions, it should be noted:

- As stated in paragraph 2.7, we are formally required to add the 'sparsity factor' into our local formula. As the addition of this factor into our 2023/24 formula is mandatory, and as none of our school / academies are eligible, we are not consulting on this. We will inform the DfE, via our Authority Pro-forma Tool (APT) return in January, that we have mirrored the NFF sparsity factor in 2023/24.
- The construct of the national high needs funding system – the notional value of £4,000 for element 1 and £6,000 for element 2 – remains unchanged from 2022/23 arrangements.
- The role of Bradford's Dedicated Schools Grant in the funding of PFI (Building Schools for the Future) remains unchanged, limited to funding the agreed DSG Affordability Gap. PFI funding is a matter that the Schools Forum wishes to monitor closely within the national 'hard' NFF review work to come.
- The Education and Skills Funding Agency (ESFA) made a change at April 2022 to how payments to billing authorities from mainstream primary and secondary maintained schools and academies for business rates (NNDR) can be managed. This change was optional. Bradford Local Authority has determined not to implement the amended approach at this time.
- The data source for the Pupil Premium Grant (PPG) has been transferred on a permanent basis from the annual January Census back to the annual October Census. 2023/24 PPG allocations data will be sourced with reference to the pupils recorded in the October 2022 Census.
- The Local Authority has recently directly contacted schools and academies that currently receive split sites funding, in order to collect information and to verify their continuing eligibility for split sites funding under the DfE's proposed new NFF split sites factor, which is planned to be introduced for 2024/25. We take the opportunity here to highlight the DfE's eligibility criteria, so that all schools and academies are able to review whether they might be eligible. Please contact Jonty Holden with any queries and if you do assess that you might be eligible. The DfE's eligibility criteria are listed in the embedded document below.



split sites eligibility

3.5 Running alongside these decisions, we wish to explain the position of the use of the Reception Uplift Factor for the primary phase.

- We employed the Reception Uplift Factor, on a one-off exceptional basis, in 2022/23, using £0.495m of the £0.917m primary-phase surplus balance that was carried over from 2021/22. For 2022/23, this factor enabled the Local Authority to increase the funded pupil number count for schools and academies that had higher reception year numbers recorded in the January 2021 Census than were recorded in the

October 2020 Census. Recognising that the October Census is taken relatively early in the autumn term, the purpose of the Reception Uplift Factor is to fund primary schools and academies that have substantial later intakes of pupils into their reception years (as a result e.g. of admission of pupils on appeal or from having available places as a consequence of under-subscription). Albeit that this funding is allocated a year in arrears. In 2022/23, we allocated funding in respect of 102 additional reception year pupils.

- We used the Factor within our local formula, up to 2017/18. However, as the Factor is not used or funded within the DfE's National Funding Formula (NFF), in order to fully mirror the NFF, we ceased to use it at April 2018. Only 11 local authorities used it in 2022/23.
- We explained in our consultation, published this time last year, that we would not normally revisit the decision to cease using the Factor, but for closer consideration of the financial implications of the COVID-19 pandemic. An area of concern that was raised by Schools Forum members was the delay in the normal primary-phase admissions appeals timetable that the pandemic caused in autumn 2020, meaning that potentially a larger than normal number of primary phase appeals for the reception year were concluded after the October 2020 Census was taken. Applying the Reception Uplift Factor was intended to help minimise the negative financial impact of this situation on schools and academies that admitted reception year children on appeal between October 2020 and January 2021. Although we identified that this Factor would also more generally support primary schools and academies that were undersubscribed in their reception years, the main rationale for our re-introduction of the Factor was the COVID-19 pandemic impact in autumn 2020. Its use was intended to be one-off and exceptional.
- As such, we are minded not to use the Reception Uplift Factor again in 2023/24. There is also an affordability consideration, as the cost of the Factor (c. £0.50m) would need to be met from available headroom, or from balances, as it is not funded by the DfE. We identify already that there is likely to be pressure in meeting the cost of our main 2023/24 formula funding arrangements, which will require the use of balances, before we then would add a further £0.50m of cost for the Reception Uplift Factor.

Decision 1 - Whether we transfer budget from the Schools Block to the High Needs Block in 2023/24

3.6 This is the first decision in our consultation, because a transfer of monies out of the Schools Block of the Dedicated Schools Grant (DSG) directly affects the amount of funding that is available to spend on mainstream primary and secondary formula funding and therefore, what level of uplift and what Minimum Funding Guarantee we can afford to propose in 2023/24.

3.7 On current estimates, our High Needs Block allocation in 2023/24 is £111.90m. This represents an increase of 6.4% in cash terms and 6.8% in per pupil terms. This increase is lower than received in recent years. Our overall cash increase was 10% in 2022/23 and 14% in 2021/22. This lower increase aligns with our assessment, that the current 3-year national school funding settlement has been weighted towards 2022/23, with reduced increases to be allocated in 2023/24 and in 2024/25. We anticipate that High Needs Block funding nationally may only increase between 3% and 5% in 2024/25. On this assumption, whilst we forecast the continued growth in the numbers of children and young people in Bradford with EHCPs, we also forecast that our High Needs Block financial position will be significantly challenging going forward. Our management of this position must begin in 2023/24, and we discuss this further within our separate High Needs formula funding consultation.

3.8 However, the high needs funding settlements that we have recently received from the DfE have put Bradford's High Needs Block in a fundamentally much stronger position than was the case back at the start of the transition to the National Funding Formula in 2018/19. **As a result, the Local Authority does not propose to transfer Schools Block funding to the High Needs Block in the 2023/24 financial year.** This means that the full Schools Block settlement will be retained for spending on the funding of mainstream primary and secondary provision.

3.9 At the end of the 2021/22 financial year, within the High Needs Block, we held a cumulative surplus balance of £23.021m. The Authority has discussed the retention and uses of this balance with the Schools Forum, over the spring and summer terms, and we have identified already that we are likely to need to use a substantial proportion of this balance in 2023/24. We will continue to discuss the High Needs Block with the Schools Forum across the autumn term.

Decision 2 – Whether we continue to fully mirror the DfE’s 2023/24 National Funding Formula

3.10 The table below shows the DfE’s National Funding Formula (NFF) factors in 2023/24, as these are applied to Bradford (so adjusted for area costs - ACA), compared against those used for 2022/23. These are the factors that we use in Bradford to allocate formula funding to mainstream primary and secondary schools and academies. The key changes for 2023/24 are:

- The values of the NFF pupil-led factors have been uplifted in line with the DfE’s settlement, which we’ve described in paragraph 2.3. As in previous years, prior to the application of the ACA, the DfE has rounded the NFF variable values to the nearest £5. This rounding affects the % increases.
- The mandatory minimum levels of funding per pupil (MFLs) have been increased from £4,265 to £4,405 (primary) and from £5,525 to £5,715 (secondary).
- The Base £APP (AWPU), Lump Sum and FMS6 (Ever 6) factors have been further increased in order to allocate the Schools Supplementary Grant, which has been merged into the National Funding Formula.
- We have added the National Funding Formula Sparsity Factor, as we are now required to have this factor within our local formula (although no schools or academies in Bradford are eligible for funding).

Factor	NFF £ 2023/24	NFF £ 2022/23	£Diff	% Diff
Primary – Base £APP (AWPU)	£3,394.54	£3,217.51	+ £177.03	+ 5.50%
Secondary – Key Stage 3 Base £APP	£4,785.77	£4,536.73	+ £249.04	+ 5.49%
Secondary – Key Stage 4 Base £APP	£5,393.86	£5,112.82	+ £281.04	+ 5.50%
Lump Sum – Primary & Secondary	£128,020	£121,319	+ £6,701.00	+ 5.52%
Primary - Deprivation – FSM Ever 6	£705.11	£590.09	+ £115.02	+ 19.49%
Primary - Deprivation – Flat FSM	£480.08	£470.08	+ £10.00	+ 2.13%
Secondary - Deprivation – FSM Ever 6	£1,030.16	£865.14	+ £165.02	+19.07%
Secondary - Deprivation – Flat FSM	£480.08	£470.08	+ £10.00	+ 2.13%
Primary - Deprivation – IDACI F	£230.04	£220.04	+ £10.00	+ 4.54%
Primary - Deprivation – IDACI E	£280.04	£270.04	+ £10.00	+ 3.70%
Primary - Deprivation – IDACI D	£440.07	£420.07	+ £20.00	+ 4.76%
Primary - Deprivation – IDACI C	£480.08	£460.07	+ £20.01	+ 4.35%
Primary - Deprivation – IDACI B	£510.08	£490.08	+ £20.00	+ 4.08%
Primary - Deprivation – IDACI A	£670.11	£640.10	+ £30.01	+ 4.69%
Secondary - Deprivation – IDACI F	£335.05	£320.05	+ £15.00	+ 4.69%
Secondary - Deprivation – IDACI E	£445.07	£425.07	+ £20.00	+ 4.71%
Secondary - Deprivation – IDACI D	£620.10	£595.10	+ £25.00	+ 4.20%
Secondary - Deprivation – IDACI C	£680.11	£650.10	+ £30.01	+ 4.62%
Secondary - Deprivation – IDACI B	£730.12	£700.11	+ £30.01	+ 4.29%
Secondary - Deprivation – IDACI A	£930.15	£890.14	+ £40.01	+ 4.49%
Primary - English as an Additional Language (3)	£580.09	£565.09	+ £15.00	+ 2.65%
Secondary - English as an Additional Language (3)	£1,565.25	£1,530.24	+ £35.01	+ 2.29%
Primary – Low Prior Attainment	£1,155.18	£1,130.18	+ £25.00	+ 2.21%
Secondary – Low Prior Attainment	£1,750.28	£1,710.27	+ £40.01	+ 2.34%
Primary - Pupil Mobility	£945.15	£925.15	+ £20.00	+ 2.16%
Secondary – Pupil Mobility	£1,360.22	£1,330.21	+ £30.01	+ 2.26%
Primary – Minimum £APP (MFL)	£4,405	£4,265	+ £140.00	+ 3.28%
Secondary – Minimum £APP (MFL)	£5,715	£5,525	+ £190.00	+3.44%
Primary – Sparsity Lump Sum	£56,309.01	n/a	n/a	n/a
Secondary – Sparsity Lump Sum	£81,913.10	n/a	n/a	n/a

3.11 So, the NFF in 2023/24 retains the same dynamic as in the last five years, including its focus on Additional Educational Needs (AEN) funding, the Low Prior Attainment factor within AEN, and the lower value of lump sum, which has been one of the most significant factors in terms of impact of the NFF on smaller schools and on the primary phase more widely.

3.12 The Authority's case for moving to fully replicate the DfE's NFF, originally put forward for 2018/19, was strongly supported. Schools and academies in Bradford have since continued to support our close mirroring of the NFF. Therefore, we believe schools and academies will also support the principle that, in this short period, prior to the final establishment of the 'hard' NFF, when further transition has been directed by the DfE for 2023/24 for all local authorities, our local formula funding arrangements should continue to move fully in line with the DfE's NFF as this uplifts and incrementally develops. For point of reference, 74 (out of 152) authorities in 2022/23 directly mirrored the NFF, as we did.

3.13 We propose therefore, **subject to final affordability (please see decision 6), that we will continue to fully mirror the NFF in 2023/24, using the 'NFF 2023/24' factor values shown in the table above.**

3.14 The indicative impact of this proposal is shown in Appendices 1a and 1b. Please also refer to the explanation of the modelling in paragraph 4.

Question 1 - Do you agree that our local formula in 2023/24 should fully mirror the DfE's 2023/24 National Funding Formula and that this formula should be used to calculate primary and secondary school and academy mainstream formula funding allocations? If not, please explain the reasons why not.

Decision 3 – The % level of the Minimum Funding Guarantee (MFG)

3.15 The Minimum Funding Guarantee (MFG) is the mechanism through which the Authority must ensure a minimum percentage increase in funding per pupil for all schools and academies in 2023/24. Typically, we seek to set the MFG at the maximum that is permitted by the Regulations, provided that this is affordable, having also considered the minimum that has been provided by the DfE within its NFF settlement, as well as how costs in schools and academies may increase, especially following teacher and support staff pay awards and salary on-costs changes.

3.16 The DfE permits the Minimum Funding Guarantee in 2023/24 to be set between 0% and positive 0.5%. 0.5% would mean, simply for example, that a school or academy that is funded on the MFG, and that has the same total pupil numbers recorded in October 2022 as recorded in October 2021, will receive in 2023/24 the cash value of its 2022/23 core-formula funding, plus its Schools Supplementary Grant, uplifted by 0.5%.

3.17 The DfE has provided a floor (a minimum increase) of + 0.5% in its notional 2023/24 NFF calculations for individual schools and academies. A 0.5% MFG in Bradford would effectively pass this floor through to delegated budgets in Bradford.

3.18 As we have presented in section 2, the permitted range of the MFG, between 0% and 0.5%, is much narrower than was permitted in 2022/23, and the maximum of 0.5% is also much lower than the maximum 2.0% that could be set in both 2021/22 and 2022/23. Schools and academies that are funded on the MFG will receive a maximum 0.5% increase in their funding per pupil in 2023/24. This is very likely to be lower than the increase that these schools and academies will have forecasted (1.5%), based on the DfE's approach in the last 2 years to setting the minimum and maximum MFG levels.

3.19 In this context, as well in the context of the pay award and inflationary cost pressures that all schools and academies currently face, we take the view that it is essential that we set the MFG at the maximum that is permitted by the Regulations, and at the level that has been funded by the DfE. **So, subject to final affordability (please see decision 6), we propose to set the Minimum Funding Guarantee (MFG) in 2023/24 at the maximum permitted level of positive 0.5%.** The impact of this is shown in Appendices 1a and 1b, illustratively, at individual school and academy level. Please note that this illustrative modelling is still based on the October 2021 Census dataset. Whether schools and academies are funded on the MFG in 2023/24, as well as the value of MFG funding, will be affected by the changes that are recorded in the October 2022 Census dataset.

Question 2 - Do you agree with the proposal, subject to final affordability, to set the Minimum Funding Guarantee at the maximum permitted positive 0.5% in 2023/24? If not, please explain the reasons why not.

Decision 4 – Whether we continue unchanged our existing local approaches to the factors not yet covered by the NFF

3.20 **Business rates (NNDR)** will continue to be funded at actual cost. The Education and Skills Funding Agency (ESFA) made a change at April 2022 to how payments to billing authorities from mainstream primary and secondary maintained schools and academies for business rates (NNDR) can be managed. This change was optional. Bradford Local Authority has determined not to implement the amended approach at this time.

3.21 **We propose to continue in 2023/24 our current formulae for the allocation of split sites funding.** Please see the technical annex at Appendix 2. We propose to increase the values of the variables used within the split site formula by 2.4%, in line with the uplift of the core NFF factors (the AWPU and lump sum, before the addition of the Schools Supplementary Grant), subject to final affordability (please see decision 6). Please see paragraph 3.4 for information about the continuation of split sites funding in 2024/25.

3.22 **We propose to continue to pass through the specific BSF DSG Affordability Gap values using our current method** (please see Appendix 2), continuing the adjustment to ensure that the amounts passed on to academies by the ESFA on an academic year basis are equivalent to the amounts that the Authority requires academies to pay back on a financial year basis.

Question 3a - Do you agree with the proposal to continue to use our existing formula for the allocation of split sites funding, uplifted by 2.4% in 2023/24 (subject to affordability)? If not, please explain the reasons why not.

Question 3b - Do you agree with the proposal to continue to use our existing formula for the apportionment of BSF DSG Affordability Gap funding in 2023/24? If not, please explain the reasons why not.

Decision 5 – Notional SEND Budgets

3.23 **We propose to amend in 2023/24 our definition of Notional SEND budgets within mainstream primary and secondary school and academy formula funding allocations.**

3.24 Local authorities are required to define for each primary and secondary school and academy the value of its mainstream formula funding that is 'notionally' allocated for Special Educational Needs and Disabilities (SEND) - for meeting the first £6,000 of the cost of the additional needs both of pupils with EHCPs and also of pupils without EHCPs. This not additional funding, but a definition of how much funding, that is already allocated, is available to support SEND. How Bradford currently (in 2022/23) defines notional SEND (the %s of funding within each formula factor that make up this budget) is shown in the table below. We have also explained our current Notional SEND budget approach in Appendix 2. The Section 251 Budget Statements for maintained schools, and the General Annual Grant (GAG) Statements for academies, show the calculation of Notional SEND budgets for individual schools / academies. We also publish on Bradford Schools Online, annually in February, the calculation of Notional SEND budgets for all primary and secondary schools and academies in Bradford for the following financial year.

3.25 Our current definition has built up over time, but, in particular, is based on how we began to delegate EHCP (then known as SEND Statements) funding to schools around 15 years or so ago, before the advent of the current national place-plus high needs funding methodology and the £6,000 element 2. We have identified that we should look again at our definition, but, as we've explained in consultations in recent years, we have not progressed a local review because we expected that the DfE's national SEND Review, as well as the movement to the hard National Funding Formula, would determine how Notional SEND would work in the very near future. The DfE did also previously suggest that the concept of a Notional SEND budget could be replaced with something else.

3.26 The DfE however, has now confirmed that Notional SEND budgets will continue to be defined going forward and that, at the point the hard National Funding Formula is introduced (by 2027/28 at the latest), there will be a national consistent definition.

3.27 Highlighting that there is currently quite a bit of difference in how local authorities define Notional SEND budgets for schools and academies in their areas, and seeking to encourage movement towards greater

consistency prior to the establishment of the hard National Funding Formula, the DfE has recently published new [operational guidance](#) for local authorities. Whilst this guidance does not prescribe how authorities should now define Notional SEND, it does strongly encourage all local authorities to review their approaches, and sets out broad expectations.

3.28 We have reviewed our approach, especially by comparing our definition to national, regional and other useful averages (including similar High Needs Block funded authorities and Metropolitan District Authorities). Our rationale for approaching our review this way is that, as was the case with the initial construction of the National Funding Formula, and as is now behind the DfE’s methodology for the review of NFF factors (including e.g. split sites funding), we anticipate that a national consistent definition of Notional SEND will be strongly informed by averages (by the common national picture). Where we are different, we wish to begin to make changes, to bring our approach closer in line with averages, incrementally, rather than having a significant single change at the point the hard National Funding Formula is established. It may also be the case that the DfE does further prescribe approaches for Notional SEND prior to 2027/28, and we wish to be well placed to absorb this.

3.29 In our review, we have not intrinsically set out with the aim of significantly altering the values of Notional SEND budgets that are retained by schools and academies, either overall or by the majority of individual settings. By this, we mean that, if we compare what Notional SEND budgets would be in 2023/24 using our current approach, against a new approach, there aren’t significant differences overall or within the majority of schools / academies (when we look at Notional SEND as a % of funding or on a per pupil basis). One of the changes that we propose however, does specifically increase the Notional SEND budgets for schools and academies that receive funding via the MFL factor. However, we feel that there is a clear rationale for this, which is explained below.

Irrespective of whether we use the existing or the new method, the overall total value of Notional SEND budgets is expected to increase in 2023/24, due to pupil numbers and other changes (including the merger of the Schools Supplementary Grant), as well as due to the 2023/24 funding settlement. Individual schools and academies however, will see differences (both up and down) due to pupil numbers and pupil circumstances changes (differences between the October 2022 and the October 2021 Censuses), again, irrespective of whether we use the current or the new method.

3.30 Following our review, we propose to make two changes to our definition of Notional SEND budgets in 2023/24. Firstly, we propose to bring our definition of Notional SEND more in line with national averages, by adjusting the percentages of the different factors that make up the Notional SEND budget, as follows:

Current

Formula Factor	% Primary	% Secondary
Prior Low Attainment Factor	100%	100%
Free School Meals Factor	23.1%	10.2%
Income Deprivation Affecting Children Index (IDACI) Factor	22.4%	19.2%
Base £APP funding (AWPU)	7.5%	6.3%

Adjusted to

Formula Factor	% Primary	% Secondary
Prior Low Attainment Factor	100%	100%
Free School Meals Factor	25.0%	25.0%
Income Deprivation Affecting Children Index (IDACI) Factor	25.0%	25.0%
Base £APP funding (AWPU)	6.5%	4.0%

3.31 Secondly, we propose to bring into the definition of Notional SEND a proportion of the additional funding that schools and academies receive via the Minimum Levels of per Pupil Funding (MFL) factor. We propose, for both primary and secondary phases, to bring 48% of MFL funding into the Notional SEND Budget. The rationale for this is to improve the fairness and equity of our definition. A principal reason why per pupil funding levels vary between schools / academies is differences in the levels of additional needs of pupils, as measured by Free School Meals, IDACI, Low Prior Attainment etc. The MFL factor brings the per pupil funding for all schools and academies up to a defined minimum. It is the case that 2 primary schools, for example, could receive £4,405 per pupil in 2023/24, one receiving this via the ‘normal’ funding formula and

one receiving this because the MFL has kicked in to provide the minimum of £4,405. Using our current definition, the school that receives £4,405 via the normal formula has an appropriate proportion of its additional needs funding included within its Notional SEND budget. However, because we don't currently bring in the MFL factor, the school that receives a top up to the £4,405 does not. On this basis, we take the view that the inclusion of the MFL factor within our Notional SEND budget definition will improve the fairness and equity of this definition. We have calculated 48% taking an aggregate of the %s that are used across the other factors.

3.32 Illustrative modelling, showing the impact of these 2 changes on the Notional SEND budgets of individual schools and academies, is presented at Appendix 1c. We must stress that this modelling is illustrative. It is calculated on the same basis as the main Appendix 1a and 1b formula funding modelling. Please see section 4 for an explanation of this basis. Appendix 1c does not show what confirmed final 2023/24 Notional SEND budgets will be. In particular, these final budgets, which will be published in February 2023, will be influenced by the changes in data that are recorded in the October 2022 Census. We would also like to highlight, for the MFL schools and academies, that the increases in their Notional SEND budgets, as a result of the inclusion of the MFL factor, is offset by the other proposed changes in the definition, including the reduction in the % taken from Base £APP (AWPU) funding.

3.33 We will continue to annually review our Notional SEND definition in the lead up to the hard National Funding Formula, including in response to any further prescription from the DfE, and may consult on further incremental changes.

3.34 Please note that we intend to continue to add to Notional SEND budgets 6.0% of a mainstream school's or academy's allocation from the Early Years Single Funding Formula, for mainstream primary schools and academies that have early years entitlement provision.

3.35 Finally, we wish to highlight that our separate consultation on high needs formula funding discusses the continuation of the mainstream SEND Funding Floor in 2023/24. All schools and academies are strongly encouraged to access this consultation.

Question 4 - Do you agree with the proposal to adjust our definition of Notional SEND within mainstream primary and secondary formula funding? If not, please explain the reasons why not.

Decision 6 – How we would amend our mainstream primary and secondary funding formula, if necessary for affordability reasons, should the total cost of the formula substantially increase (and be unaffordable) when the October 2022 Census dataset is used.

3.36 Lag in the pupil-need data, such as Free School Meals %s and Low Prior Attainment %s, between that, which is required to be used to calculate individual school and academy formula funding allocations and that, which is used by the DfE to calculate Dedicated Schools Grant funding to local authorities, is a feature of the current formula funding system. For the current 2022/23 financial year, for example, schools and academies have been funded with reference to their October 2021 Census data. The Local Authority however, received Dedicated Schools Grant (DSG), from which the cost of these school and academy allocations must be met, calculated using data recorded a year earlier in the October 2020 Census. For 2023/24, schools and academies will be funded with reference to their October 2022 Census data, whereas the Local Authority will receive DSG funding using the October 2021 Census dataset.

3.37 Where there are only relatively small data changes year on year, or where there are 'ups and downs' in different data streams, which generally cancel each other out, this lag does not cause overall affordability problems. By 'affordability problems', we mean that the cost of formula funding using the National Funding Formula mirroring approach (Decision 2) exceeds the value of Dedicated Schools Grant funding that the Authority has received from the DfE, to the extent that the Authority has to adjust its proposals to reduce cost.

3.38 One of the problems in managing this situation is that, although we can identify and very indicatively estimate in advance potential areas of change, we do not know for certain whether our formula funding proposals are affordable until we receive the relevant October Census dataset from the DfE in December

each year. It is difficult to model the impact for individual schools and academies with certainty in advance of receiving the dataset.

3.39 In our consultation documents, published in recent years, we have always highlighted this as an issue and we have stated that our proposals are subject to a final 'affordability check'. We have also always previously stated that, if we need to adjust our proposals, we will work closely with the Schools Forum. Prior to 2022/23, affordability was not really a big issue. Although there have been some changes in individual factors, the overall cost of formula funding using the final December dataset has either been as expected or has reduced rather than increased.

3.40 In our 2022/23 consultation however, we discussed this issue in more detail, and presented a set of management options, because we identified that, partly as a consequence of the COVID-19 pandemic, we would have greater swings in costs associated with individual formula factors, as a result of greater differences between the data recorded with reference to the October 2021 Census and the data recorded with reference to the October 2020 Census. This time last year we identified the potential for significant cost changes in 2 areas in particular:

- Free School Meals %s (both Flat and Ever 6) recorded in the October 2022 Census, which we expected to substantially increase on the %s recorded in October 2021.
- As the summer 2019 assessment results were used for a 3rd cohort of children (due to the absence of summer assessments), Low Prior Attainment (LPA) allocations for schools and academies were generally expected to reduce in 2023/24 vs. 2022/23. This is because attainment in 2019 was better on average than in the years where the data dropped out of the LPA calculation.

3.41 Ultimately, our 2022/23 funding formula, using the October 2022 Census dataset, cost £0.95m more than using the October 2021 Census dataset. Within this, the cost of the FSM factors was £1.80m greater and the cost of the Low Prior Attainment factor was £0.66m lower (the balance accounted for by changes in other factors). Rather than adjust our formula funding proposals, we decided with the Schools Forum in January 2022 to use Schools Block budget headroom, which was created from a one-off reduction in Growth Fund costs, alongside a small value of Schools Block reserves.

3.42 Whilst we anticipate that the cost of data lag will be lower in 2023/24 than it was in 2022/23, we still do expect that there will be cost. We anticipate that our FSM%s will generally have increased again between October 2021 and October 2022. We also anticipate that our Low Prior Attainment costs will reduce again, but that this reduction will not fully offset the increase in FSM costs. Lower MFG and MFL levels in 2023/24 mean that there is greater potential for material changes in the cost of formula funding. Changes in data will have implications for the allocations received by individual schools and academies in 2023/24. Schools and academies need to be alert to this, and we give further warning in section 4. But changes also have implications for the affordability of our formula funding approach; in particular, full mirroring (Decision 2).

3.43 As such, we feel that it continues to be appropriate, and will continue to aid transparency, to set out in a little more detail the approaches that the Authority would take were we to find that the funding formula approach that we set out in this consultation document for 2023/24, in particular under Decisions 2 (mirroring of the NFF) and 3 (the MFG set at 0.5%), is not affordable when we use the October 2022 Census dataset provided by the DfE in December. We wish to give schools and academies the opportunity now to provide feedback. This feedback will help guide our continued discussions with the Schools Forum on this issue.

3.44 The 4 broad options that are available are:

- A. Use a value of brought forward balances (one off monies) either to afford our proposals without amendment or to reduce the size of other amendments that might be applied.

- B. Reduce our funding formula factor values, moving away from exact mirroring of the NFF as proposed in Decision 2, so that the cost fits within the Dedicated Schools Grant budget available on a phase-specific basis. Within this, in order to comply with the DfE's tightening of the Regulations regarding the National Funding Formula in 2023/24, we would not be permitted to reduce our formula factor variable values by more than 2.5%.
- C. Re-introduce a ceiling, which would cap the year on year %increases in per pupil funding for individual schools and academies that, for example, see higher than average %per pupil increases.
- D. Reduce the Minimum Funding Guarantee (MFG) from the 0.5% proposed in Decision 3. Within this, we would not be permitted to set an MFG at lower than 0%.

To be clear on a specific point - we would not be permitted to reduce the values of the Minimum Levels of Funding (MFLs), as these values are set by the DfE and are mandatory. Therefore, the minimum values of £4,405 (primary) and £5,715 (secondary) per pupil will be unaffected by any affordability adjustments that we may make.

3.45 It is the Authority's view currently that:

- Using brought forward balances (A) will be an initial management option. However, we must be careful to ensure that affordability can be managed on an on-going basis. Balances can only be spent once and using these to support an on-going formula funding cost issue may potentially create affordability problems for 2024/25.
- Reducing the Minimum Funding Guarantee (D), from the 0.5% proposed, would be the last adjustment we would consider and, if we reduced it, we would only do so having first reduced formula factor values (B). This would be in recognition of the importance of the MFG for the primary-phase and also of the need to ensure that the DfE's funded minimum increase of 0.5% is passed through to schools and academies, in response to estimated growth in costs. Not providing an MFG at the maximum permitted 0.5%, whilst not making any other formula funding cost adjustments, would also further widen the gap in the increases in funding received by schools and academies on the MFG versus those funded on the National Funding Formula.
- Re-introducing a ceiling (C) would be considered before adjusting the MFG but, again, only in combination with adjusting the formula factor values (B). We specifically recognise that we would need to very carefully consider the impact a ceiling would have on individual schools and academies. We would not wish the re-introduction of a ceiling to have a disproportionate impact on the funding received by a relatively small number of schools and academies for supporting pupils with Additional Educational Needs (AEN), including pupils who share protected characteristics who strongly correlate with measures of AEN. It is likely that schools and academies, that will see above average % increases in per pupil funding in 2023/24, will achieve these increases because the level of AEN of their pupils has grown. We would need to be very careful about the impact a ceiling would have on reducing funding growth for individual schools and academies in such circumstances.
- The main 'go-to' option for reducing the overall cost of formula funding, after use of brought forward balances, but before a reduction in the MFG and before the re-introduction of a ceiling, would be to reduce the values of the factor variables (B). In doing this, the Authority would not adjust how each formula factor works, but would adjust the value of the variable used for that factor. We would make these adjustments on a phase-specific basis i.e. the adjustments for primary may be different than those for the secondary phase because the formula funding affordability position for the primary phase may be different.

The values of the variables that are currently proposed for 2023/24 are shown in the table under Decision 2.

We propose that we would take a 'collective pro-rata' scaling style approach to adjusting variable values, meaning that we would reduce all factors by the same %, with the scaling % set at the value required to bring the cost of the total formula by phase back within the budget available. There are different approaches that could be taken here, but this kind of 'collective pro-rata' scaling approach ensures, firstly, that we would 'step away' from mirroring the National Funding Formula in an even way. This means, crucially, that this will create less turbulence when seeking to return to mirroring from April 2024, when further DfE restrictions are likely to be introduced. Secondly, this approach means that adjustments would not have a disproportionate impact on individual Additional Educational Needs formula factors and the funding that schools and academies receive via these factors. We assess, for example, that there would be a significant disproportionate impact were we to offset any growth in the FSM factor cost only by reducing the values of the FSM variables.

Once we have the final affordability figures, and we know the % reduction that might be needed, we will look more closely with the Schools Forum at our approach before finalising this in January 2023.

3.46 We recognising that the discussion here is technical as well as a little abstract. Whilst we are not certain currently that such affordability adjustments will be necessary (or the scale of them if they are, or if the scale will be such that we would need to use more than one adjustment), we nonetheless think it is helpful to highlight this now as a potential issue. We welcome any views that you might have on how best to approach this and we welcome any specific points that you wish the Authority and the Schools Forum to consider, including with reference to your own school or academy.

Question 5 - Do you have any views on how the Authority should adjust the 2023/24 funding formula, from that which is proposed in this consultation, should the total cost of the funding formula substantially increase (and be unaffordable) when the October 2022 Census dataset is used. We welcome any specific points that you would wish the Authority and the Schools Forum to consider.

Decision 7 – Whether we retain, with their existing criteria and methodologies, the funds currently managed centrally within the Schools Block

3.47 The DfE's National Funding Formula does not yet include a methodology, which prescribes how Growth Funding should be allocated at individual school and academy level. Local authorities in 2023/24 therefore, retain the responsibility for determining arrangements locally, albeit within tight Regulations. Local Authority compliance with these Regulations is checked annually by the Education and Skills Funding Agency (EFSA). **Our proposed Growth Fund arrangements and criteria for 2023/24 are set out in the documents embedded under paragraph 6. These are unchanged from current arrangements.**

3.48 We established back in 2019/20 a Falling Rolls Fund for our primary phase. **Our proposed Falling Rolls Fund arrangements and criteria for 2023/24 are set out in the document embedded under paragraph 7. These are unchanged from current arrangements.**

3.49 This document also asks for feedback on the continuation for the 2023/24 financial year of funds de-delegated from maintained primary and secondary schools within the Schools Block of the Dedicated Schools Grant. **Our proposed de-delegated fund arrangements and criteria for 2023/24 are set out in paragraph 5 and also in detail in Appendix 3. These are unchanged from current arrangements.**

Question 6 - Do you agree with the proposed criteria and methodology for the allocation of the Growth Fund to schools and academies in 2023/24? If not, please explain the reasons why not.

Question 7 - Do you agree with the proposed criteria and methodology for the allocation of the Falling Rolls Fund to primary-phase schools and academies in 2023/24? If not, please explain the reasons why not.

Question 8 – Should sums continue or cease to be de-delegated from maintained school budgets in 2023/24 for the purposes listed? Please explain the reasons why if you believe that these should cease or change.

4. Consultation Impact Modelling

4.1 As the set of formula funding decisions that are required to be taken for 2023/24 are relatively straightforward, the modelling attached with this document is relatively simple.

Appendix 1a is a single sheet model, which shows actual formula funding allocations, plus Schools Supplementary Grant allocations, for each primary and secondary school and academy for the current 2022/23 financial year, compared against illustrative allocations for 2023/24 that are calculated on the Authority's proposals and using estimated October 2022 pupil numbers.

Appendix 1b is a ready reckoner, which provides a breakdown by factor of the totals (shown in columns 4 and 9 in Appendix 1a) for each school and academy.

Appendix 1c is a model, which shows the illustrative impact of the proposed amendment to the definition of Notional SEND budgets within primary and secondary mainstream formula funding allocations.

4.2 To clarify what Appendix 1a and Appendix 1b show:

- All modelling for academies uses the Authority's financial year figures not the academic year General Annual Grant (GAG) figures calculated by the EFSA (which the Authority does not see).
- This modelling is calculated on the proposals before any affordability adjustments would be made under Decision 6.
- The illustrative 2023/24 allocations include the Schools Supplementary Grant (SSG), which has been merged into core formula funding. Mainstream primary and secondary schools and academies must now cease to budget for the SSG as a separate additional allocation. All schools and academies should carefully check their 2023/24 budget scenarios (including any scenarios that are continued from existing ones) to ensure that they are not double counting the SSG.
- The totals in Appendix 1a for 2022/23 (column 4) and for 2023/24 (column 9) are the core delegated formula funding allocations excluding business rates, split sites and PFI. These totals also exclude all additional High Needs place and EHCP top up funding, Growth Funding, Falling Rolls Funding, Early Years funding, Post 16 funding and all other additional separate grant streams (PPG, UIFSM etc).
- Apart from pupil numbers, all pupil-level data used to calculate the 2023/24 illustrative allocations shown in column 9 e.g. IDACI, FSM%, EAL%, Low Prior Attainment is sourced from the October 2021 Census (or with reference to the pupils that were recorded as on roll in the October 2021 Census) and is the same data that was used to calculate actual 2022/23 core formula funding allocations. **Schools and academies should remember that actual 2023/24 allocations will be calculated on updated data sourced from (or with reference to the pupils recorded on roll in) the October 2022 Census. Using updated October 2022 Census data may quite significantly change the value of formula funding received by an individual school or academy in 2023/24 from what is shown in Appendix 1. This is especially the case in schools and academies that are not already substantially funded via the Minimum Funding Guarantee (MFG) or those that do not receive substantial uplifts to the DfE's minimum per pupil funding levels (MFLs).**
- The 2023/24 illustrative allocations are calculated **using an estimate of pupil numbers that will be recorded in the October 2022 Census**. This means that the cash differences between 2023/24 and 2021/22 allocations (Appendix 1a column 13) include the impact of the estimated growth or estimated reduction in pupil numbers between October 2022 and October 2021.

4.3 The key at the bottom of Appendix 1a explains what is shown in each column. The modelling helps identify in particular:

- The scale of the growth or reduction in the numbers of funded pupils estimated between October 2022 and October 2021 (column 15).
- The range of % uplifts that may be received by individual schools and academies next year, in total cash (column 13) and per pupil terms (column 16), incorporating estimated changes in pupil numbers between

October 2022 and October 2021, but before any further pupil-level data changes that may be recorded in the October 2022 Census are brought in. To aid analysis, column 18 shows the % change in per pupil funding when the 2023/24 allocations are calculated using the same total number of pupils that were funded in 2022/23. Column 18 therefore, shows the impact of formula funding proposals on a like-for-like pupil numbers basis.

- How formula funding proposals, combined with the estimated changes in pupil numbers, but before any further pupil-level data changes that may be recorded in the October 2022 Census are brought in, affect the total cash values of formula funding allocations that may be received by schools and academies in 2023/24 compared with 2022/23 (column 13).
- The schools and academies that were funded on the DfE's Minimum Levels of per pupil Funding (MFLs) in 2022/23 (column 7) and indicatively will be funded on the uplifted MFLs in 2023/24 (column 12). Schools and academies that are on the MFLs in both years will see a 0.5% per pupil increase in core formula funding in 2023/24.

Schools and academies that were funded on the MFLs in 2022/23 have a positive figure in column 7. Schools and academies that are modelled at this time to remain on the MFLs in 2023/24 also have a positive figure in column 12.

Depending on their October 2022 Census datasets, and changes in pupil-level data, schools and academies currently modelled in Appendix 1 to be on the MFLs in 2023/24 may come off these to be funded at a per pupil funding value that is higher. This might happen especially in schools and academies that received only relatively small values of MFL funding in 2022/23. The opposite may also happen, again depending on changes in pupil-level data recorded in the October 2022 Census. Schools and academies that in 2022/23 were not funded on the MFLs may find that they come onto the MFLs in 2023/24. This might happen especially in schools and academies that are reasonably close already to the MFL values and that might see changes in pupil-level data from the October 2022 Census that reduce their per pupil funding.

To stress, as it is based on October 2021 Census data, the Appendix 1 modelling does not show the impact of October 2022 Census data changes on a school's or academy's position versus the MFL in 2023/24. This impact can only be modelled using the October 2022 Census dataset when this is provided in December.

- The schools and academies that were funded in 2022/23 on the Minimum Funding Guarantee (MFG) and that may remain on the MFG in 2023/24 to receive the proposed minimum 0.5% per pupil increase. These schools and academies are highlighted in purple in Appendix 1a. The funding of these schools and academies will be directly affected by the final value of the MFG we set in 2023/24. For example, if under Decision 6, for affordability reasons, we were to set the MFG at lower than 0.5% (but not lower than 0%), these schools and academies would be directly affected.

Schools and academies that were funded on the MFG in 2022/23 have a positive figure in column 6. Schools and academies that are modelled at this time to remain on the MFG in 2023/24 also have a positive figure in column 11. If the figure in column 6 is zero then the school or academy was not on the MFG in 2022/23. If the figure in column 11 is zero then the school or academy is modelled at this stage to be off the MFG in 2023/24.

As with the warning given above about the MFLs, schools and academies must treat the MFG modelling with caution at this time. A school's or an academy's position versus the MFG in 2023/24 may change when the October 2022 Census dataset is used to calculate final allocations. For example, a reduction in Low Prior Attainment (LPA) funding may mean that a school or an academy comes onto the MFG in 2023/24, when it was not funded on the MFG in 2022/23 and is not currently modelled to be on the MFG in 2023/24. This is because the reduction in LPA funding may mean that the school or academy would not receive a minimum 0.5% increase in per pupil funding through the application of the normal National Funding Formula and so must have its funding topped up to the 0.5% minimum.

Using an opposite example, an increase in FSM funding, because a school's or an academy's FSM% recorded in the October 2022 Census is higher than that recorded in October 2021, may mean that a school or academy comes off the MFG in 2023/24, when it was on the MFG in 2022/23 and is currently

modelled to remain on the MFG in 2023/24. This is because the increase in FSM funding is substantial enough to result in a total per pupil funding uplift in 2023/24 that exceeds the 0.5% minimum that would be provided by the MFG.

Generally speaking, these sorts of position changes are more likely in schools and academies that receive only relatively small values of MFG funding. For schools and academies that receive quite large values of MFG funding, it will take more substantial changes in pupil-level data to alter their positions versus the MFG in 2023/24. These changes may take more than one year to have an impact.

However, to stress, because it is not based on October 2022 Census data, the current modelling in Appendix 1 does not yet show the impact of changes in pupil-level data on a school's or academy's position versus the MFG in 2023/24. This impact can only be modelled using the October 2022 Census dataset when this is provided in December.

- The schools and academies funded in 2022/23 on the Minimum Funding Guarantee (MFG) that may come off the MFG in 2023/24 because the size of uplifts received from our continued mirroring of the National Funding Formula is greater than the minimum 0.5% the MFG provides.

If the figure in column 6 is positive and the figure in column 11 is zero then the school or academy is modelled on current October 2021 based-data to come off the MFG in 2023/24 as a result of the NFF funding uplift. In the Appendix 1 modelling at this stage, these schools and academies may receive increases in 2023/24, which are above the 0.5% per pupil provided by the MFG but which are lower than the increases received by schools and academies that were not on the MFG in 2022/23. This position is created because the value of MFG protection previously allocated in 2022/23 is deducted from the school's or academy's total % gain in 2023/24.

Typically, schools and academies that received only small values of MFG funding in 2022/23, may come off the MFG in 2023/24, subject to what happens with their pupil-level data to be taken from October 2022 Census.

- The schools and academies that are not currently funded on either the Minimum Funding Guarantee or on the DfE's per pupil minimums (MFLs) i.e. they are funded purely on the National Funding Formula, and may remain so in 2023/24, depending on the impact of changes in their pupil-level data to be recorded in the October 2022 Census. These schools and academies have zeros in all columns 6, 7, 11, and 12. They may receive increases in funding per pupil that are more in line with, or may actually exceed, the overall 'headline' National Funding Formula uplift. However, the funding received by these schools and academies is more prone to being directly affected by year on year census data changes. Depending on their October 2022 Census data, the confirmed final values of their 2023/24 formula funding allocations could change more significantly, both up and down, from what is currently modelled in Appendix 1 than for schools and academies that are on the MFG or on the MFLs.

4.4 On the basis of the illustrative modelling in Appendix 1a, the formula funding landscape in Bradford in 2023/24 is as follows:

- Primary phase: 51 out of 156 schools / academies (33%), are funded on the Minimum Funding Guarantee (at 0.50%). 26 schools / academies (17%) are funded at the £4,405 MFL value. All other schools / academies are funded above £4,405 per pupil.
- Secondary phase: 3 out of 31 schools / academies (10%) are funded on the Minimum Funding Guarantee (at 0.50%). 1 academy is funded at the £5,715 MFL value. All other schools / academies are funded above £5,715 per pupil.
- All through academies: None of the 4 academies are funded on the Minimum Funding Guarantee (at 0.50%) and all 4 academies are funded above the composite MFL value.
- In total, 54 out of 191 schools / academies (28%) are funded on the Minimum Funding Guarantee (at 0.50%). 27 out of 191 schools / academies (14%) are funded at the MFL values.

4.5 If you would like to discuss the modelling in more detail, or discuss the data on which indicative allocations are calculated, please contact Jonty Holden.

5. 2023/24 Schools Block De-Delegated Funds (Maintained Schools)

5.1 The Finance Regulations continue to significantly restrict the extent to which the Dedicated Schools Grant (DSG) Schools Block can be retained and managed centrally. The Government's intention is to ensure maximum delegation of DSG funding to maintained schools and academies at the start of each financial year. The Regulations do allow funding for certain types of expenditure to be 'de-delegated' - passed back to the Local Authority - from maintained school budgets within the Schools Block. This only applies however, to schools maintained by the Local Authority, and the maintained schools members of the Schools Forum must agree to de-delegate on a phase-specific, fund-specific, basis.

5.2 Previously, the Schools Forum has established Schools Block de-delegated funds to:

- Take advantage of the economies of scale brought about by central management and bulk purchase e.g. Fischer Family Trust subscription.
- Provide services that schools would find difficult or less cost effective to replace on an individual basis e.g. trade union facilities time.
- Protect schools, especially smaller schools, against unpredictable expenditure e.g. maternity and paternity cover.
- Provide funds to be available to support schools in financial difficulty or those facing exceptional circumstances, allocated using agreed criteria.
- Cover the costs in schools of Authority-level re-organisation, including safeguarded salaries, and also the cost of deficit budgets of closing schools or deficits held by schools that convert to academy status under sponsored arrangements.
- In 2022/23, to provide budget for the Local Authority's school improvement monitoring, intervention and brokering function (including statutory functions) in respect of maintained schools, following the DfE's reduction of the School Improvement Monitoring and Brokering Grant (SIMB).

5.3 Decisions to de-delegate funding must be taken annually.

5.4 The Schools Forum will discuss the position of de-delegated funds for 2023/24 over the autumn term and will take final decisions in January 2023. This document asks for your feedback so this can be considered as part of this process. This consultation asks for your views on whether funds should continue to be de-delegated.

5.5 Please be aware that, due to the timescale necessary for confirmation, the Schools Forum has already decided to continue / dis-continue de-delegation in 2023/24 from maintained primary schools for the purposes of subscribing to Fischer Family Trust.

5.6 Maintained schools are reminded that:

- Schools Forum members representing maintained secondary schools agreed, in the 2017/18 DSG budget setting round, to cease de-delegation from the secondary phase for the Maternity / Paternity 'insurance' scheme, Fischer Family Trust, Exceptional Circumstances and School Staff Public Duties and Suspensions. It is assumed that the Schools Forum and maintained secondary schools will not wish to revisit this decision.
- Schools Forum members representing maintained primary schools agreed to cease de-delegation for behaviour support services at 1 September 2018. Maintained schools now have the choice to buy into these services directly. It is assumed that the Schools Forum and maintained primary schools will not wish to revisit this decision.
- The DfE operates a Risk Protection Arrangement (RPA). The RPA is an alternative to commercial insurance. The DfE extended the RPA to maintained schools, who have been able to buy into this since 1 April 2020. Where agreed by the Schools Forum, the Local Authority is permitted to de-delegate for the

purposes of accessing the RPA on behalf of all its maintained schools. However, we do not envisage de-delegating for this purpose in 2023/24.

5.7 The following 'de-delegated' funds are held in the current 2022/23 financial year:

- FSM Eligibility Assessments (primary and secondary).
- Fischer Family Trust – School Licences (primary only).
- School Maternity / Paternity 'insurance' (primary only).
- Trade Union Facilities Time (primary & secondary).
- Trade Union Health and Safety Representative Time (primary & secondary).
- School Staff Public Duties and Suspensions Fund (primary only).
- School Re-Organisation Costs (primary and secondary).
- Exceptional Costs & Schools in Financial Difficulty (primary only).
- School Improvement – replacement of the DfE's reduced SIMB Grant (primary & secondary). This was a new de-delegated fund in 2022/23.

5.8 Further information on each of these funds, including the values held in 2022/23 and the criteria by which they are allocated, is given in Appendix 3.

5.9 We do not propose any amendments for 2023/24 to the criteria that are used for the allocation of de-delegated funds.

5.10 If funding is not de-delegated in 2023/24, for the purposes listed in paragraph 5.7, then the funding that would have been top-sliced will remain within maintained school budgets for schools to meet the cost of replacement services, including by purchasing services, where available, through the Local Authority. The Authority is aware that the views of individual schools may be influenced by the extent of value they feel they receive from accessing these funds currently. In taking final decisions, the Schools Forum will consider specific responses to this consultation, alongside assessing what represents the most cost effective collective approach for maintained schools across the Bradford District.

5.11 Colleagues in maintained primary schools will be aware of the warnings that have been given previously about the viability of our current arrangements for supporting maternity / paternity costs. We have warned, as happened for the secondary phase in 2017/18, that we may be moving towards the position where existing arrangements are no longer financially efficient nor viable. This is due to the growth in salaries costs at the same time as the number of maintained primary schools continuing to reduce year on year. The maternity / paternity scheme will continue in 2023/24, subject to agreement following this consultation. However, the continuation of this scheme from April 2024 will be reviewed. If it is necessary to cease this scheme at a point in the future, we will further discuss with the Schools Forum how maintained primary schools are given sufficient time to respond.

6. Schools Block Growth Fund 2023/24

6.1 We operate a Growth Fund within the Schools Block, which supports both maintained schools and academies that are expanding for basic-needs purposes, at the request of the Local Authority, to manage more effectively the financial pressures brought by expansion. This fund helps to maintain a stable financial platform for schools and academies across the District in support of raising standards.

6.2 The DfE's National Funding Formula does not yet include a methodology, which prescribes how Growth Funding should be allocated at individual school and academy level. Local authorities in 2023/24 therefore, retain the responsibility for determining arrangements locally, albeit within tight Regulations. Compliance with these Regulations is checked annually by the Education and Skills Funding Agency (ESFA).

6.3 Our proposed Growth Fund arrangements and criteria for 2023/24 are set out in the documents embedded below. These are unchanged from the current arrangements. Please note that the values highlighted in red within the documents are indicative (subject to the finalisation of Decision 2).



Growth Funding
2023 - primary criteri



Growth Funding
2023 - secondary crite

6.4 For reference, the total value of the Schools Block Growth Fund held in 2022/23, broken down between phases and between types of allocation, prior to the recovery through recoupment of the cost of allocations to academies for the period April – August 2022, is shown in the table below:

	Primary	Secondary	Total
Existing Known Expansions	£119,824	£565,442	£685,266
Existing Bulge Classes	£103,709	£0	£103,709
New Expansions	£0	£859,200	£859,200
Pre-Opening Costs	£0	£0	£0
Diseconomies of Scale	£0	£0	£0
Total Value 2022/23	£223,533	£1,424,642	£1,648,175

6.5 We will confirm the total value of the Schools Block Growth Fund held for 2023/24 as part of the DSG setting process, which will be concluded with the Schools Forum in January 2023.

7. Falling Rolls Fund 2023/24 (Primary Phase)

7.1 The Schools Forum first established a Falling Rolls Fund for the primary phase in 2019/20. We propose to continue to operate this Fund in 2023/24 using the established criteria, which are presented in the embedded document below. This will continue for the primary-phase only.



Falling Rolls Fund
2023-24

8. Consultation Responses

8.1 If you wish to discuss these proposals in more detail, or have any questions for clarification, before you submit a response, please contact Jonty Holden using the contact details shown in section 1.

8.2 A response form is included at Appendix 4. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response. Please access the web-based questionnaire [here](#).

8.3 Please ensure that your response is submitted (either using the Appendix 4 form or by using the web-based questionnaire) by the deadline of **Tuesday 29 November 2022**. Any responses received after this date may not be included in the analysis that will be presented to the Schools Forum.

9. Next Steps

9.1 Following consideration of the responses received to this consultation, and consideration of the final recommendations that will be made the Schools Forum, Council in February 2023 will set the funding formula to be used to calculate budget shares to be allocated to individual mainstream primary and secondary schools and academies, and the criteria for the allocation of Schools Block funds, for the 2023/24 financial year.

9.2 Discussions on the position of the Dedicated Schools Grant (DSG), and the affordability of formula funding arrangements, for 2023/24 will continue with the Schools Forum between now and January. You are recommended to keep in touch with these discussions by visiting the Schools Forum webpage on the Council's Minutes website [here](#).

9.3 It is anticipated that the Schools Forum will make its final formal recommendations on 2023/24 DSG and formula funding arrangements on Wednesday 11 January 2023.

10. Equalities Impact Assessment 2023/24 Proposals

10.1 The Public Sector Equality Duty (PSED) of the Equality Act 2010 requires the Local Authority to give due regard to achieving the following objectives in exercising its functions:

- Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010.
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

10.2 We assess that our proposals for 2023/24 will have a positive impact on equalities. We have considered the impact on persons who share any of the protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation. We have focused on the protected characteristics for which the potential impact is largest, and which are most closely tied to the formula funding proposals we put forward. Where there is positive correlation with the measures that are used, schools and academies receive formula funding to support children and young people that share protected characteristics, related to SEND (disability) and race (ethnicity), through the Additional Educational Needs (AEN) factors that are contained within the schools' funding formula. The AEN factors are: Free School Meals (FSM), Income Deprivation Affecting Children Index (IDACI), English as an Additional Language (EAL), Low Prior Attainment (LPA) and Pupil Mobility. There is strong correlation between LPA and SEND. There is also strong correlation between race (ethnicity), EAL and Pupil Mobility. There are also correlations e.g. between SEND and measures of deprivation and between LPA and measures of deprivation. It is important therefore, that the Authority carefully considers, in particular, the equalities impact of any proposed changes to the AEN factors.

10.3 The arrangements that the Local Authority proposes in this consultation for the 2023/24 financial year retain a significant amount of continuity on current practice, Dedicated Schools Grant distribution and formula funding policy and methodology. At its centre, the Local Authority has previously determined, and continues to propose (Decision 2), to exactly mirror the DfE's National Funding Formula (NFF) for the calculation of mainstream primary and secondary maintained school and academy delegated allocations in Bradford. As such, our equalities impact assessment of our guiding Schools Block formula funding policy for 2023/24 is neutral (representing no change on current positive practice) and continues to align with the DfE's in respect of its [National Formula Funding policy](#) and its already identified positive impact on the funding of children and young people that share protected characteristics.

10.4 Behind the guiding NFF mirroring policy, the values of all formula funding factors are proposed to be uplifted in 2023/24 (Decision 2). These uplifts are assessed to have a positive impact on the funding of all pupils. These uplifts will have a positive impact on the funding of children and young people that share protected characteristics related to disability (SEND) and race (ethnicity), for which schools and academies receive additional funding through the Additional Educational Needs (AEN) formula factors that use measures that correlate with these protected characteristics. The uplifts proposed to be applied to the AEN factors are also assessed at this time not to have a disproportionate impact. In proposing to continue to mirror the National Funding Formula (NFF) in 2023/24, on current data, the balance of base NFF funding allocated for all pupils, versus the NFF funding allocated for pupils with Additional Educational Needs, remains similar, but marginally weighted more to AEN factors (due to the DfE's weighting of the 2023/24 settlement, as explained in paragraph 2.3). As we show in section 2, and in the table under 'Decision 2', we propose to uplift basic £per pupil and lump sum funding by 2.4%, prior to the addition of the merged Schools Supplementary Grant. We propose to set a minimum 0.50% uplift in per pupil funding for all schools and academies, using the Minimum Funding Guarantee methodology. The DfE requires the Minimum Levels of Per Pupil Funding (MFLs) to increase by 0.50% (prior to the addition of the Schools Supplementary Grant). The factors that

allocate funding on measures of Additional Education Needs (AEN) are proposed to increase between 2.1% and 4.3% (prior to the addition of the Schools Supplementary Grant).

10.5 The balance of the total final value of formula funding allocated in 2023/24, between base funding and AEN funding and between the different AEN funding factors, will adjust for the annual change in school data to be recorded in the October 2022 Census. Whilst we cannot yet complete accurate modelling, two changes we anticipate are that funding allocated through the FSM factors will continue to increase and funding allocated through the LPA factor will continue to decrease. As we explain in section 4, our modelling of the impact of formula uplift is currently based on existing school and academy data, which references the October 2021 Census. We have explained in section 4 of this document how the distribution of formula funding in 2023/24, and the values of allocations received by individual schools and academies, may be affected by the use of the updated October 2022 Census data. We have explained under 'Decision 6' how the Authority may be required to amend the uplifts that are applied to formula funding factors to ensure that our arrangements remain affordable. We have also set out under 'Decision 6' how the Authority will take steps to ensure that any necessary amendments do not have a disproportionate impact, including on the funding of children and young people that share protected characteristics for which schools and academies received formula funding through the Additional Educational Needs factors.

10.6 The Minimum Levels of Per Pupil Funding (MFLs) are increasing by 0.5%. This is a mandatory uplift, not for local determination. The DfE has assessed that this uplift will have a positive impact on equalities. Continuing the minimum per pupil funding levels will generally benefit the lower £per pupil funded schools and academies, that do not otherwise attract these levels of funding through the application of the normal National Funding Formula i.e. these schools and academies do not attract significant levels of funding via the Additional Educational Needs factors. These schools and academies tend to have lower than average proportions of groups with protected characteristics. However, they still tend to have some groups with protected characteristics. As the DfE states in its impact assessment, the lower than average funding increases for schools and academies funded through the minimum levels in 2023/24 (0.5% per pupil) should be considered in the context of higher than average funding increases for these schools and academies in recent years.

10.7 We propose to set the Minimum Funding Guarantee (MFG) for primary and secondary schools / academies at + 0.5% (Decision 3). The MFG at this level will provide the maximum permitted uplift to formula funding, both for schools and academies that have previously been on the MFG and remain on it in 2023/24 as well as for the schools and academies that are placed on the MFG for the first time in 2023/24 as a result of October 2022 Census data changes. The MFG uplift will be available for these schools and academies to use in support of all pupils, including those that share protected characteristics. Our proposed approach to the MFG is especially important for the primary phase, where 43% of schools and academies were funded on the MFG in 2022/23. The MFG continues to provide essential protection for schools and academies against year-on-year funding turbulence, in support of stable provision.

10.8 We assess that proposing (under Decisions 4 and 7) to continue our other current local approaches not yet covered by the National Funding Formula, including to Growth Funding and Falling Rolls Funding, in 2023/24 is impact neutral on equalities (representing no change on current positive practice).

10.9 We assess that proposing (under Decision 5) to incrementally amend our definition of Notional SEND budgets within mainstream primary and secondary formula funding allocations, as encouraged by the DfE and to bring us more in line with the common national picture in the lead up to the hard National Funding Formula, continues to support schools and academies to make effective provision for pupils with additional educational needs and with Special Educational Needs and Disabilities. The inclusion of funding allocated by the Minimum Level of Per Pupil Funding (MFL) factor will improve the fairness and equity of our definition and will help support schools and academies that receive the MFL to use the totality of their delegated funding in support of their pupils with SEND. It is important to stress that an adjustment of the Notional SEND definition does not materially change the value of formula funding that an individual school or academy receives.

11. Appendices

- Appendix 1a – Summary Financial Overview (Modelling)
- Appendix 1b – By Factor Breakdown (Ready Reckoner)
- Appendix 1c – Notional SEND Modelling

Appendix 2 – Technical Annex
Appendix 3 – Schools Block De-Delegated Funds (Maintained Schools)
Appendix 4 – Responses Questionnaire

Appendix 2 – Technical Annex (Current Formulae)

This appendix contains more technical detail on the definitions and calculations of factors that are contained within Bradford Local Authority's current 2022/23 financial year primary and secondary school and academy mainstream funding model.

Notional SEND (Mainstream Schools Block Primary & Secondary)

Local authorities are required to define for each primary and secondary school and academy the value of mainstream formula funding that is 'notionally' allocated for Special Educational Needs and Disabilities (SEND) (for meeting the first £6,000 of needs both for pupils with EHCPs and the needs of pupils without EHCPs). How Bradford currently (in 2022/23) defines notional SEND (the %s of funding within each formula factor that make up this budget) is shown in the table below.

Formula Factor	% Primary	% Secondary
Prior Low Attainment Factor	100%	100%
Free School Meals Factor	23.1%	10.2%
Income Deprivation Affecting Children Index (IDACI) Factor	22.4%	19.2%
Base £APP funding (AWPU)	7.5%	6.3%

In addition, 6.0% of a mainstream school's or academy's allocation from the Early Years Single Funding Formula, for mainstream primary schools and academies that have early years entitlement provision, is also defined to be available for supporting SEND in early years.

Following the introduction of the Minimum Level of Per Pupil Funding Factor (MFLs) in the primary and secondary funding formula, some mainstream schools and academies now receive what can be determined to be Additional Educational Needs (AEN) pupil-led funding through the MFLs, rather than through the AEN formula factors, which are used to define published notional SEND budgets. For point of clarity therefore, the Authority will consider MFL allocations within discussions that may be had with individual schools and academies about available delegated SEND monies.

SEND Funding Floor (Mainstream Primary & Secondary)

For 2022/23, we agreed to continue to trial (for a further year pending review) an amended Special Educational Needs and Disabilities (SEND) Funding Floor formula. This Floor is re-calculated on a monthly basis for changes in the numbers of Education Health and Care Plans (EHCPs) on roll.

This formula is aimed at ensuring that no mainstream primary or secondary school or academy will have to manage, from their own mainstream delegated formula funding, an above phase-average cost pressure in respect of their commitment to meet the cost of Element 2 £6,000 for their EHCPs. As well as supporting provision for pupils with EHCPs, this approach helps to protect the funding used by schools and academies to support their wider Additional Educational Needs, SEND and Alternative Provision activities. It directly financially supports schools and academies that have higher proportions of pupils with EHCPs, in support of inclusion, combining also to support schools and academies that may have lower levels of Additional Education Needs formula funding (because they have e.g. lower levels of deprivation) but higher numbers of EHCPs and also that may be smaller in size. It supports schools and academies that may have some turbulence in formula funding as a result of in year pupil numbers changes.

The formula for 2022/23 is as follows:

Where A is greater than B a school / academy receives a top up for the difference between A and B.

A = is the Full Time Equivalent (FTE) number of EHCPs in a school / academy (mainstream provision, excluding early years and post 16 students) multiplied by £6,000 (Element 2).

B = is the % of a school's Additional Educational Needs delegated formula funding that is required to be put to the Element 2 £6,000 cost of a school's EHCPs, before the SEND Funding Floor will provide additional financial support. There are 2 parts to the calculation, the % and what is meant by Additional Educational Needs delegated formula funding. Both these are fixed for the 2022/23 financial year, as follows

- The % is the phase median average % of Additional Educational Needs formula funding that schools / academies contribute to Element 2 £6,000 costs in respect of their EHCPs. The phase average is rounded plus 1%. Separate percentages are used for primary and for secondary phases. For 2022/23, these averages are set at 11% for the primary phase and 10% for the secondary phase.
- Additional Educational Needs delegated formula funding is calculated by taking the following funding factors within the delegated formula funding allocations received by mainstream schools / academies. For academies, this is within their General Annual Grant (GAG) funding:

- 100% of the English as an Additional Language factor
- 100% of the Free School Meals factors
- 100% of the Prior Attainment factor
- 100% of the Minimum Funding Level factor
- 100% of the Income Deprivation Affecting Children Index (IDACI) factor
- 80% of Minimum Funding Guarantee factor

Split Sites (Mainstream Primary & Secondary)

Our split sites factor operates in 2022/23 as follows:

a) The criteria used to define a split site are as follows:

- *Essential* - two or more distinctly separate campuses where there is no single continuous boundary and where the campuses are split by a through road.
- Additional criteria (for weighting of funding):
 - Category A* - where it is impossible not to move a proportion (either 25% or 50%) of total school / academy pupils between the campuses within the school day
 - Category B* - where the campuses are more than 400 metres apart

b) The criteria used to allocate funding to a school / academy operating across a split site based on the categories defined above, are as follows:

Category	Primary Lump	Primary APP	Secondary Lump	Secondary APP
<i>Essential</i>	£9,394.63	0.00	£10,793.52	0
<i>A</i>	0	£118.86	0	£125.42
<i>B</i>	£20,330.08	£10.10	£22,683.34	£14.10

- Split sites funding is paid to all individual schools and individual academies that meet the above criteria.
- Split sites funding is only allocated where the provision on the additional site does not itself qualify for an individual budget share through the DSG. Federated maintained schools, and schools / academies sharing facilities, are not eligible for split sites funding. Schools / academies with remote sixth forms or remote early years provision are also not eligible. Split sites funding also does not apply to co-located or offsite SEND resourced provisions or Alternative Provision centres.
- The criteria include where a school or academy has remote playing fields, which the school is financially responsible for maintaining and which are also more than 1 mile in distance away from the main school site.
- Where two or more schools have amalgamated, and the new school is operating across a split site, the school will not be eligible for split sites funding where this materially increases the school's allocation above the Minimum Funding Guarantee whilst it is in receipt of any additional lump sum funding.
- Funding is only applicable for Reception to Year 11 mainstream provision.

PFI DSG affordability Gap Funding (Building Schools For the Future)

Our Private Finance Initiative (PFI) / BSF formula factor (mainstream secondary) simply apportions the DSG's contribution to the affordability gap of the Building Schools for the Future (BSF) programme across applicable secondary schools and academies.

The formula for splitting the total contribution between BSF schools / academies is as follows: (Total affordability gap to be funded by the DSG / Total cost of school unitary charges) x Individual school's unitary charge as a % of the total unitary charge.

As a result of discussions with the ESFA (during 2017), the financial year values of the PFI formula allocations for academies only is adjusted so that, when the ESFA converts these allocations into academic year values within academy's General Annual Grant funding, the values the academies receive on an April to March financial year basis is equivalent to the value that the academy is required to repay to the Authority through the PFI contract on an April to March financial year basis.

Other Technical Matters

The following guiding aspects of the current 2022/23 mainstream primary and secondary formula funding framework remain in place in 2023/24:

- DSG sourced formula funding allocations for mainstream primary (reception to year 6) and mainstream secondary (pre 16) will be calculated on the October 2022 Census.
- The Pupil Premium Grant for mainstream primary and secondary schools and academies will continue to be allocated on the October rather than the January Census.
- Local authorities must allocate at least 80% of the delegated schools block funding through the pupil-led factors, which include the base amount per pupil, deprivation (FSM and IDACI), low prior attainment, English as an additional language and pupil mobility factors. We allocated 92.1% of the delegated schools block funding via these pupil-led factors in 2022/23, and the modelling included in this consultation indicates that we continue at around this % in 2023/24.
- The existing framework for the funding of High Needs pupils continues. A High Needs pupil is still defined in 2023/24, for financial purposes, as one whose education costs more than £10,000 per year. The first elements of funding (Element 1 and Element 2) for High Needs pupils continue to be already delegated within school and academy budget shares. A top up (Element 3) is then allocated separately, on a monthly basis, for the cost of additional support above the £6,000 threshold as defined within agreed Education Health and Care Plans (EHCPs). Top up funding arrangements are set out in more detail on our separate consultation on high needs funding.
- Allocations for academies and free schools continue to be paid directly by the Education & Skills Funding Agency (ESFA). The ESFA will use the pro-forma submitted by the Authority in January 2023 to calculate individual academy allocations for the 2023/24 academic year.
- The Local Authority has opted to continue to manage school and academy Business Rates (NNDR) payments according to the approach that was in place in 2021/22, rather than adopt the ESFA's amended process from April 2022. This remains the Authority's approach for 2023/24.

Appendix 3: Purposes of Schools Block De-Delegated Funds Retained in 2022/23

1. FSM Eligibility Assessments:

This fund covers the work the Local Authority's Benefits Team does in relation to assessing Free School Meals (FSM) eligibility for pupils in maintained primary and secondary schools. It covers staffing and ICT costs associated with:

- The processing of all applications for FSM for all maintained schools
- Checking & verifying claims, notifying parents of successful and unsuccessful claims
- Notifying schools of successful claims and changes to existing claims
- Assisting schools with eligibility, take up and administrative issues & providing guidance
- Promoting maximum take up of FSM eligibility, including cross checking pupil FSM data with other Authority benefits systems

The Local Authority makes use of a nationwide FSM checking system, which means that paper evidence does not have to be supplied by parents. Applications for all children who attend Bradford schools can be processed quickly via the Council's website, telephone, personal visit or in writing. Currently, schools do not have direct access to this checking system.

If this de-delegated fund is not held in 2023/24, schools will either need to undertake FSM assessment themselves or purchase services. The Local Authority offers a traded service to academies.

2. Fischer Family Trust – Primary School Licences:

This fund pays for maintained primary schools' subscriptions to Fischer Family Trust (FFT). FFT provides a unique service to schools and the local authorities. This services analyses previous national end of key stage data and the contextual data of schools and uses this to provide estimates of outcomes at pupil level for the next key stage result. These pupil level results are aggregated at school and at local authority level. Over time, these estimates have come to be held in high regard and the work of the FFT is valued by schools and local authorities. The purchasing of the data through the Local Authority has recently offered significant savings.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

If this de-delegated fund is not held in 2023/24, maintained primary schools will need to purchase their own licences to access FFT data, on an individual basis or as a cluster of schools. **Please be aware that due to the timescale necessary for confirmation, the Schools Forum has already decided to continue / dis-continue de-delegation in 2022/23 from maintained primary schools for the purposes of subscribing to Fischer Family Trust.**

3. Primary School Maternity / Paternity 'insurance':

This fund has historically acted as an 'insurance' pot, where maintained primary schools are reimbursed for the costs of the salaries of staff on maternity / paternity leave, so that the cost of cover / supply arrangements can be afforded from the school's budget. The Schools Forum has previously discussed the delegation of this pot to schools on a number of occasions and has always concluded that the protection this centrally managed fund offers, against the disproportionate and unpredictable nature of maternity / costs, is vital, especially to smaller schools.

De-delegation for this purpose ceased from the secondary phase during 2017/18.

If this de-delegated fund is not held in 2023/24, maintained primary schools will not be reimbursed for the salary costs of staff on maternity / paternity leave and would have to make alternative arrangements to

manage this costs, for example, by including maternity cover within the school's supply insurance arrangements or by working in clusters to share the cost of staffing cover.

Colleagues in maintained primary schools will be aware of the warnings that have been given previously about the viability of current arrangements for supporting maternity / paternity costs. We have warned, as happened in the secondary sector, that we may be moving towards the position where existing arrangements are no longer financially efficient or viable. This is due to the growth in cost at the same time as a reducing number of maintained schools following conversions to academy. The maternity / paternity scheme will remain in place for 2023/24, subject to agreement through this consultation. However, the continuation of this from April 2024 will be reviewed. Schools will be given warning where a decision is taken to cease this fund and we will discuss with the Schools Forum how schools can be given sufficient time to respond.

4. Trade Union Facilities Time & Health and Safety Facilities Time:

There is a legal obligation (under The Trade Union and Labour Relations (Consolidation) Act 1992) for an employer to provide facilities for recognised trade unions to function within the workplace, including an obligation to grant time off with pay. The recognised unions in schools are:

- Teacher Trade Unions - NEU, ATL, ASCL, NAHT, VOICE, and
- The Trade Unions representing support and other professional school staff – UNISON, GMB and UNITE

To meet this obligation, Bradford Council has agreed to release a number of staff for part or all of their time from their school duties to carry out their duties as elected lay officials. This applies to the recognised trade unions in schools with significant memberships. Historically the agreed ratio for facility time has been 1 day per 400 members, which has been used as a mutually acceptable, in principle, starting point for the joint management and trade union discussions. Current facility time arrangements with respect to school employees provide a total of 7.3 FTE as follows:

- NEU has 3.1 FTE lay officials (15.5 days per week)
- NASUWT has 1.8 FTE lay officials (9 days per week)
- NAHT has 0.4 FTE lay official (2 days per week)
- UNISON has 1.3 FTE lay officials (6.5 days per week)
- GMB has 0.6 FTE lay officials (3 days per week)
- ASCL has 0.1 FTE lay official (1 day a fortnight)

If this de-delegated fund is not held in 2023/24, individual maintained primary and secondary schools will need to consider how they will meet their statutory obligations to allow trade unions to represent and consult with their members and with the school as the employer, as local branch trade union representatives would no longer be available without cost. For example, each trade union has the right to appoint a trade union representative within a school to carry out statutory functions, and seek time off for these representatives to be trained to carry out these duties.

In order to comply with the letter and the spirit of the Health and Safety Regulations, Bradford Council and the Trade Union Health and Safety Lay Representatives in Bradford made a Health and Safety Agreement in 1989. Nominated accredited Trade Union and lay Health and Safety representatives continue to carry out Health and Safety inspections in schools, with the aim being to inspect each school once a year, and are released for all or part of their time from their school responsibilities to carry out these duties. Safety Representatives also carry out site management visits in relation to building work and work with the Council's Health and Well Being Team on occupational matters and undertake the role of investigating accidents, disease and other medical matters. A total of 6 days per week (1.2 FTE) of facilities time is currently funded within the DSG for these purposes.

If this de-delegated fund is not held in 2023/24, individual maintained primary and secondary schools will need to consider how they will meet their employer statutory obligations around health and safety.

The Schools Forum has recently considered a detailed assessment of the Authority's current Trade Union Facilities Time arrangements, and has concluded that these arrangements are effective and continue to offer value for money.

5. School Staff Public Duties and Suspensions Fund:

This fund has historically acted, on a similar basis to the maternity / paternity scheme, as an 'insurance' type pot for maintained primary schools to be reimbursed for staffing costs associated with public duties (magistrates / court duties) and, more significantly, where an employee is suspended from duty following a Child Protection allegation and where the Police are undertaking an investigation. In the case of suspensions, schools are reimbursed for 50% of the cost of the salary of the member of staff suspended.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

If this de-delegated fund is not held in 2023/24, maintained primary schools will not be reimbursed for the salary cost of staff and would have to make alternative arrangements to manage this cost.

6. School Re-Organisation Costs:

This fund serves two purposes and the proposed criteria for allocating funding in 2023/24 are unchanged from 2022/23:

- School staff safeguarded salaries: funding is allocated based on the actual cost of agreed safeguards for individual staff in primary and secondary schools. Only safeguards that have been previously agreed are funded from the DSG. So there is no 'eligibility' criteria as such, other than these safeguards must have been already established and agreed with the Authority following re-organisations. Every year, schools are asked to confirm whether or not safeguards for individual staff are still applicable e.g. where a member of staff has left, the safeguard ceases to be paid. The total cost of safeguards reduces year on year and is expected to eventually cease.
- Deficit of Closing Schools: where a maintained primary school closes with a deficit budget, or where a maintained primary school with a deficit budget converts to academy status under a sponsored agreement, the deficit returns to the Authority. The de-delegated fund is established to meet the cost of this from the DSG. Please note that there is no de-delegation from the secondary phase for this purpose. Please also note that the new de-delegation of additional budget for this purpose from the primary phase has been 'paused' since 2020/21 (as there were / are no calls on this budget).

If this de-delegated fund is not held in 2022/23, maintained primary schools will not be reimbursed for the additional salary cost of staff placed through re-organisation and the Authority would need to discuss with the Schools Forum how any deficits of maintained primary schools, that are not repaid by the school incurring the deficit, are alternatively managed.

7. Exceptional Costs & Schools in Financial Difficulty:

This fund is in place for maintained primary schools to enable additional financial support to be provided, in a transparent and controlled way, to specific schools that may face difficult circumstances and unreasonable cost pressures and also to support schools that require immediate intervention around standards that may not be able to identify funds from their own budgets.

De-delegation for this purpose ceased from the secondary phase at 31 March 2017.

The purpose of this fund is to provide support for the budgets of maintained primary schools in the following circumstances:

- Exceptional growth in pupil numbers not picked up within the terms of the Growth Fund.
- 1 Form of Entry (or smaller) primary schools, where the cost of external HR investigations places the school in financial difficulty i.e. would reduce the forecasted carry forward balance below £20,000 *

- Priority 3 or 4 schools, where additional intervention / support is required and where the school's budget cannot meet the costs without placing the school in financial difficulty i.e. would reduce the forecasted carry forward balance below £20,000 *
- Local Authority statutory interventions e.g. costs of an Interim Executive Board (IEB).
- Any other circumstance, where the exceptional nature of this is agreed by the Schools Forum and where to not provide financial support would place the school in a financially difficult position that it is likely to have a detrimental impact on outcomes for children. *

* £20,000 is a reasonable safety net to apply to all schools i.e. a school with £20,000 holds adequate reserve to meet small value additional unexpected costs.

The financial impact of exceptional in year pupil numbers growth has previously been the most common reason for schools requesting exceptional funding. The criteria for allocating funding in such circumstances in 2023/24 are unchanged from 2022/23 and are as follows:

- The main factor taken into account is the extent of additional cost pressure faced by a school. This is assessed on the information provided by the school on what action has been needed to meet a growth in pupil numbers.
- The extent of increase in numbers: actual numbers and % of roll (vs. the phase average).
- Whether the Local Authority has directed the additional pupils to the school.
- How the additional pupils are distributed across the school.
- Whether this is a one off issue i.e. the potential extent for exceptional growth and further cost pressure in future years.
- In judging exceptional funding for children admitted on appeal, what the specific circumstances are at the school which require the school to make additional provision in the first year.
- The school's carry forward balances position.
- The change in the school's expenditure shown in the Start Budget vs. Q1 vs. Q2 vs. Q3 monitoring reports.
- The Priority category of the School (is the school in Priority 3 or 4?)
- Whether the school has received financial support or funding from elsewhere.

8. School Improvement Monitoring and Brokering (SIMB):

In 2022/23, the Local Authority newly retained, via de-delegation from both primary and secondary schools, funds to replace the monies that the Authority has previously received via the DfE's School Improvement Monitoring and Brokering Grant (SIMB). De-delegation for this purpose equated to a new £4.29 per pupil contribution.

This new de-delegated fund came directly from the DfE's decision to reduce the value of SIMB grant for all local authorities by 50% for the period April 2022 to March 2023, and then to cease the grant entirely from April 2023. Within the consultation that introduced this change, the DfE stated that local authorities will be expected going forward to fund all improvement activities, including the core improvement activities previously funded by the SIMB grant, via the de-delegation of funds from maintained school budget shares.

The Local Authority has a programme of monitoring, intervention and support. In 2022/23, the Authority is using the 50% reduced SIMB grant, combined with the replacement 50% monies available following new de-delegation, to continue this programme for the period April 2022 to March 2023. A large proportion of the Authority's programme allocates the SIMB monies to reimburse schools that provide peer-to-peer school-led support for maintained schools. A good proportion of the programme also provides maintained schools with support for governance. Key activities are:

- Induction of new headteachers (support for each new headteacher of a maintained school from an experienced and success Headteacher Partner).
- Support for interim / acting headteachers (support for each new headteacher of a maintained school from an experienced and success Headteacher Partner).
- Curriculum support for middle leaders in primary schools and subject heads in secondary schools.

- Support to Schools Causing Concern, with the support model activities split between the Local Authority and a partner school.
- Leaders of Governance support schools where governance needs development, challenge and modelling of good practice.
- Advice to governing bodies in difficulty.

The complete removal of the SIMB grant at April 2023 is a larger issue that the Authority will consider with the Schools Forum for the 2023/24 DSG budget cycle. For emphasis, the £4.29 per pupil contribution in 2022/23 only replaces 50% of the existing SIMB grant funds.

2022/23 Schools Block De-Delegated Funds: Values

The table below shows the cash budget values that were de-delegated in total from maintained school budgets in the current financial year. These figures are those at the start of the year, before reductions have been made following the conversions of maintained schools to academy status during 2022/23.

Fund	Primary £	Secondary £	Total Value £
FSM Eligibility Assessments	£35,750	£11,297	£47,047
Fischer Family Trust – School Licences	£27,229	n/a	£27,229
School Maternity / Paternity ‘insurance’	£476,746	n/a	£476,746
Trade Union Facilities Time	£101,834	£32,501	£134,335
Trade Union Health and Safety Rep Time	£15,561	£4,967	£20,528
School Staff Public Duties & Suspensions Fund	£21,844	n/a	£21,844
School Re-Organisation Costs – Safeguarded salaries	£13,817	£1,024	£14,841
School Re-Organisation Costs – Deficit Budgets *	£0	n/a	£0
Exceptional Costs & SIFD	£61,300	n/a	£61,300
School Improvement (SIMB)	£100,822	£32,178	£133,000
Totals	£854,903	£81,967	£936,870

* please note that de-delegation was paused in 2022/23

The values in the above table were generated in 2022/23 by de-delegating, from individual maintained school budgets, on a flat amount per pupil basis, with the exception of FSM Eligibility Assessments fund, which has been de-delegated on an amount per Ever 6 FSM formula pupil, as follows:

Fund	Primary £app	Secondary £app
FSM Eligibility Assessments (per FSM6)	£5.80	£5.14
Fischer Family Trust – School Licences	£1.16	n/a
School Maternity / Paternity ‘insurance’	£20.29	n/a
Trade Union Facilities Time	£4.33	£4.33
Trade Union Health and Safety Rep Time	£0.66	£0.66
School Staff Public Duties & Suspensions Fund	£0.93	n/a
School Re-Organisation Costs – Safeguarded salaries	£0.59	£0.14
School Re-Organisation Costs – Deficit Budgets *	£0.00	n/a
Exceptional Costs & SIFD	£2.61	n/a
School Improvement (SIMB)	£4.29	£4.29
Total Per Pupil	£34.86	£9.42
Total Per FSM (Ever 6)	£5.80	£5.14

* please note that de-delegation was paused in 2022/23

Each maintained school has contributed from its 2022/23 delegated budget share the amounts per pupil (£app) shown above multiplied by its number of reception to year 11 pupils, or by its number of Ever 6 FSM formula pupils for FSM Eligibility Assessments.

APPENDIX 4: RESPONSES FORM

CONSULTATION PRIMARY & SECONDARY FUNDING FORMULAE 2023/24 FINANCIAL YEAR

This form can be used to submit your response. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response, instead of using this paper form. Please access the web-based questionnaire [here](#).

Name _____ School / Academy _____

Please choose your phase below:

PRIMARY SECONDARY

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS TUESDAY 29 NOVEMBER 2022

Please send completed questionnaire responses to:

jonty.holden@bradford.gov.uk

School Funding Team (FAO Jonty Holden)
City of Bradford Metropolitan District Council
Britannia House (1st Floor)
Hall Ings
Bradford
BD1 1HX

Tel: 01274 431927

Please complete the questionnaire by marking the appropriate boxes. There is a space below each question for you to record comments.

Question 1 - Do you agree that our local formula in 2023/24 should fully mirror the DfE's 2023/24 National Funding Formula and that this formula should be used to calculate primary and secondary school and academy mainstream formula funding allocations? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 2 - Do you agree with the proposal, subject to final affordability, to set the Minimum Funding Guarantee at the maximum permitted positive 0.5% in 2023/24? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 3a - Do you agree with the proposal to continue to use our existing formula for the allocation of split sites funding, uplifted by 2.4% in 2023/24 (subject to affordability)? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 3b - Do you agree with the proposal to continue to use our existing formula for the apportionment of BSF DSG Affordability Gap funding in 2023/24? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 4 - Do you agree with the proposal to adjust our definition of Notional SEND within mainstream primary and secondary formula funding? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 5 - Do you have any views on how the Authority should adjust the 2023/24 funding formula, from that which is proposed in this consultation, should the total cost of the funding formula substantially increase (and be unaffordable) when the October 2022 Census dataset is used. We welcome any specific points that you would wish the Authority and the Schools Forum to consider.

Please provide feedback here:

Question 6 - Do you agree with the proposed criteria and methodology for the allocation of the Growth Fund to schools and academies in 2023/24? If not, please explain the reasons why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 7 - Do you agree with the proposed criteria and methodology for the allocation of the Falling Rolls Fund to primary-phase schools and academies in 2023/24? If not, please explain the reasons why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 8 – Should sums continue or cease to be de-delegated from maintained school budgets in 2023/24 for the purposes listed? Please explain the reasons why if you believe that these should cease or change.

	YES - de-delegate	NO
School Improvement	<input type="checkbox"/>	<input type="checkbox"/>
FSM Eligibility Assessments	<input type="checkbox"/>	<input type="checkbox"/>
School Maternity / Paternity 'insurance'	<input type="checkbox"/>	<input type="checkbox"/>
Trade Union Facilities Time	<input type="checkbox"/>	<input type="checkbox"/>
Trade Union Health and Safety Rep Time	<input type="checkbox"/>	<input type="checkbox"/>
School Staff Public Duties and Suspensions Fund	<input type="checkbox"/>	<input type="checkbox"/>
School Re-Organisation Costs	<input type="checkbox"/>	<input type="checkbox"/>
Exceptional Costs & Schools in Financial Difficulty	<input type="checkbox"/>	<input type="checkbox"/>

(please note that subscription to Fischer Family Trust is not listed as the decision has already been made by the Schools Forum)

Please provide any additional comments here:

Please use the space below to record any further comments you would like to make on the proposals, which you have not included in your other responses.

Please send completed questionnaire responses to Jonty Holden by Tuesday 29 November 2022:

E-mail: jonty.holden@bradford.gov.uk

School Funding Team (FAO Jonty Holden)
City of Bradford Metropolitan District Council
Britannia House (1st Floor)
Hall Ings
Bradford
BD1 1HX

Tel: 01274 431927

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school / acad is modelled to be on the MFG or MFL in 23/24		2022/23 Financial Year (Actual)							2023/24 Financial Year (Illustrative Model)										
Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Phase	School	Funded Pupil No.s	Formula Funding (ex. Rates, Split Sites & PFI)	Schools Supplementary Grant	Total of Formula and Schools Supplementary Grant	Total Funding Per Pupil	MFG Allocation (at + 2.00%)	MFL (£4,265 prim; £5,525 sec)	Estimated Funded Pupil No.s Oct 2022	Illustrative Total Formula Funding (ex. Rates, Split Sites & PFI)	Illustrative Total Funding Per Pupil	MFG (at + 0.5%)	MFL (£4,405 prim; £5,715 sec)	Total £ Diff vs. 22/23	Total % Diff vs. 22/23	Diff in Pupil Numbers	£APP diff vs. 22/23	% Diff £APP vs. 22/23	% Diff £APP vs. 22/23 using same pupil no.s
All Through	Appleton Academy	1,236	7,260,685	231,423	7,492,109	6,062	0	0	1,254	7,813,098	6,231	0	0	320,990	4.28%	18	169	2.79%	2.67%
All Through	Bradford Academy	1,556	9,353,597	293,289	9,646,886	6,200	0	0	1,548	9,855,857	6,367	0	0	208,971	2.17%	-8	167	2.69%	2.66%
All Through	Bradford Girls Grammar (Free School)	997	5,337,116	161,811	5,498,927	5,515	0	0	1,030	5,854,089	5,684	0	0	355,162	6.46%	33	168	3.05%	2.60%
All Through	Dixons Allerton Academy	1,634	9,352,395	283,578	9,635,973	5,897	59,800	0	1,632	9,817,344	6,016	0	0	181,371	1.88%	-2	118	2.01%	1.99%
Primary	Addingham Primary School	207	883,057	24,103	907,160	4,382	202	42,785	203	895,925	4,413	1,710	23,851	-11,235	-1.24%	-4	31	0.71%	0.52%
Primary	All Saints' CE Primary School (Bradford)	633	3,038,379	87,743	3,126,121	4,939	0	0	611	3,102,227	5,077	0	0	-23,895	-0.76%	-22	139	2.81%	2.66%
Primary	All Saints' CE Primary School (Ilkley)	353	1,505,545	39,032	1,544,577	4,376	0	192,987	351	1,546,155	4,405	0	168,969	1,578	0.10%	-2	29	0.67%	0.67%
Primary	Ashlands Primary School	345	1,473,341	39,531	1,512,873	4,385	1,916	142,987	315	1,398,773	4,441	11,198	97,063	-114,100	-7.54%	-30	55	1.26%	0.46%
Primary	Atlas School	193	1,007,999	27,225	1,035,225	5,364	0	0	183	1,014,345	5,543	0	0	-20,880	-2.02%	-10	179	3.34%	2.66%
Primary	Baildon CE Primary School	417	1,778,505	46,346	1,824,851	4,376	0	203,294	419	1,845,695	4,405	0	177,203	20,844	1.14%	2	29	0.66%	0.66%
Primary	Bankfoot Primary School	213	1,060,642	28,256	1,088,897	5,112	25,563	0	213	1,093,701	5,135	2,513	0	4,804	0.44%	0	23	0.44%	0.44%
Primary	Barkerend Primary Leadership Academy	504	2,442,621	66,739	2,509,359	4,979	0	0	501	2,560,827	5,111	0	0	51,468	2.05%	-3	133	2.66%	2.63%
Primary	Beckfoot Allerton Primary Academy	395	1,801,201	50,780	1,851,980	4,689	0	0	382	1,842,687	4,824	0	0	-9,294	-0.50%	-13	135	2.88%	2.65%
Primary	Beckfoot Heaton Primary Academy	629	2,947,301	83,576	3,030,877	4,819	0	0	629	3,110,715	4,945	0	0	79,837	2.63%	0	127	2.63%	2.63%
Primary	Beckfoot Priestthorpe Primary School	188	866,528	24,980	891,508	4,742	38,916	0	185	883,081	4,773	21,191	0	-8,427	-0.95%	-3	31	0.66%	0.43%
Primary	Ben Rhydding Primary School	194	827,410	23,522	850,932	4,386	0	30,408	185	820,842	4,437	5,917	7,557	-30,090	-3.54%	-9	51	1.16%	0.43%
Primary	Blakehill Primary School	413	1,761,445	48,167	1,809,612	4,382	0	64,798	413	1,826,244	4,422	6,979	30,205	16,632	0.92%	0	40	0.92%	0.53%
Primary	Bowling Park Primary School	614	3,098,583	88,072	3,186,655	5,190	0	0	598	3,189,722	5,334	0	0	3,067	0.10%	-16	144	2.77%	2.67%
Primary	Brackenhill Primary School	392	1,887,370	50,989	1,938,359	4,945	44,413	0	386	1,924,145	4,985	8,818	0	-14,214	-0.73%	-6	40	0.81%	0.47%
Primary	Burley & Woodhead CE Primary School	205	874,325	23,909	898,234	4,382	0	51,847	206	907,430	4,405	0	37,030	9,196	1.02%	1	23	0.53%	0.53%
Primary	Burley Oaks Primary School	409	1,744,385	45,060	1,789,445	4,375	0	202,590	399	1,757,595	4,405	0	168,947	-31,850	-1.78%	-10	30	0.68%	0.68%
Primary	Byron Primary Academy	613	2,869,364	79,134	2,948,498	4,810	0	0	602	2,973,403	4,939	0	0	24,905	0.84%	-11	129	2.69%	2.61%
Primary	Carrwood Primary School	290	1,636,998	47,628	1,684,626	5,809	73,096	0	265	1,557,548	5,878	33,548	0	-127,078	-7.54%	-25	68	1.18%	0.46%
Primary	Cavendish Primary School	416	2,017,572	61,327	2,078,898	4,997	0	0	413	2,120,141	5,134	0	0	41,243	1.98%	-3	136	2.72%	2.68%
Primary	Christ Church Primary Academy	174	944,866	28,638	973,503	5,595	42,231	0	182	1,016,798	5,587	22,778	0	43,295	4.45%	8	-8	-0.14%	0.43%
Primary	Clayton St John's CE Primary Academy	370	1,672,695	50,033	1,722,728	4,656	0	0	372	1,775,579	4,773	0	0	52,851	3.07%	2	117	2.51%	2.55%
Primary	Clayton Village Primary School	208	1,027,515	27,260	1,054,775	5,071	69,136	0	206	1,050,453	5,099	48,673	0	-4,322	-0.41%	-2	28	0.56%	0.44%
Primary	Copthorne Primary Academy	426	2,055,935	53,596	2,109,530	4,952	0	0	422	2,144,698	5,082	0	0	35,168	1.67%	-4	130	2.63%	2.57%
Primary	Cottingley Village Primary School	415	1,769,975	49,383	1,819,358	4,384	0	106,188	414	1,823,719	4,405	49	71,578	4,361	0.24%	-1	21	0.48%	0.48%
Primary	Crossflatts Primary School	424	1,808,360	49,576	1,857,936	4,382	0	135,968	425	1,872,125	4,405	0	104,132	14,189	0.76%	1	23	0.53%	0.53%
Primary	Crossley Hall Primary School	613	2,908,178	80,936	2,989,114	4,876	0	0	607	3,037,657	5,004	0	0	48,544	1.62%	-6	128	2.63%	2.59%
Primary	Cullingworth Village Primary Academy	318	1,356,270	37,932	1,394,202	4,384	0	80,653	317	1,396,531	4,405	146	54,413	2,329	0.17%	-1	21	0.48%	0.47%
Primary	Denholme Primary Academy	189	895,690	26,522	922,212	4,879	23,329	0	185	909,291	4,915	4,486	0	-12,921	-1.40%	-4	36	0.73%	0.43%
Primary	Dixons Manningham Primary Academy	384	1,901,435	52,277	1,953,713	5,088	0	0	366	1,917,706	5,240	0	0	-36,007	-1.84%	-18	152	2.98%	2.66%
Primary	Dixons Marchbank Academy	419	2,089,629	52,916	2,142,545	5,113	200,197	0	419	2,152,618	5,138	159,881	0	10,073	0.47%	0	24	0.47%	0.47%
Primary	Dixons Music Primary	413	1,841,652	49,019	1,890,671	4,578	80,207	35,226	413	1,899,484	4,599	78,877	0	8,813	0.47%	0	21	0.47%	0.47%
Primary	East Morton CE Primary Academy	204	870,884	24,747	895,631	4,390	824	13,993	205	906,017	4,420	0	0	10,387	1.16%	1	29	0.67%	0.74%
Primary	Eastburn Junior and Infant School	211	903,485	26,106	929,591	4,406	3,570	8,055	206	921,067	4,471	0	0	-8,523	-0.92%	-5	66	1.49%	1.15%
Primary	Eastwood Primary Academy	388	1,850,343	51,609	1,901,952	4,902	6,904	0	380	1,907,128	5,019	0	0	5,177	0.27%	-8	117	2.38%	2.24%
Primary	Eldwick Primary School	523	2,230,595	56,375	2,286,970	4,373	0	276,679	517	2,277,385	4,405	0	240,441	-9,585	-0.42%	-6	32	0.74%	0.74%
Primary	Fagley Primary School	213	1,151,378	32,931	1,184,310	5,560	4,188	0	215	1,221,420	5,681	0	0	37,110	3.13%	2	121	2.17%	2.27%
Primary	Farfield Primary	389	1,975,430	60,623	2,036,054	5,234	0	0	367	1,980,294	5,396	0	0	-55,760	-2.74%	-22	162	3.09%	2.71%
Primary	Farnham Primary Academy	418	2,005,114	52,573	2,057,686	4,923	0	0	411	2,077,864	5,056	0	0	20,178	0.98%	-7	133	2.70%	2.59%
Primary	Fearnville Primary Academy	319	1,714,441	50,271	1,764,712	5,532	0	0	309	1,758,540	5,691	0	0	-6,172	-0.35%	-10	159	2.88%	2.64%
Primary	Feversham Primary Academy	403	1,943,337	52,522	1,995,859	4,953	6,512	0	392	1,989,344	5,075	0	0	-6,515	-0.33%	-11	122	2.47%	2.29%
Primary	Foxhill Primary School	206	891,386	25,621	917,007	4,451	12,796	21,281	208	928,650	4,465	12,410	4,059	11,643	1.27%	2	13	0.30%	0.43%
Primary	Frizinghall Primary School	380	1,776,050	49,558	1,825,607	4,804	0	0	368	1,816,625	4,936	0	0	-8,983	-0.49%	-12	132	2.75%	2.52%
Primary	Girlington Primary School	415	2,008,569	55,844	2,064,413	4,974	0	0	409	2,088,763	5,107	0	0	24,350	1.18%	-6	133	2.66%	2.57%
Primary	Glenaire Primary School	170	876,805	26,634	903,439	5,314	24,946	0	156	843,139	5,405	5,631	0	-60,300	-6.67%	-14	90	1.70%	0.43%

Page 1

school / acad is modelled to be on the MFG or MFL in 23/24		2022/23 Financial Year (Actual)							2023/24 Financial Year (Illustrative Model)										
Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Phase	School	Funded Pupil No.s	Formula Funding (ex. Rates, Split Sites & PFI)	Schools Supplementary Grant	Total of Formula and Schools Supplementary Grant	Total Funding Per Pupil	MFG Allocation (at + 2.00%)	MFL (£4,265 prim; £5,525 sec)	Estimated Funded Pupil No.s Oct 2022	Illustrative Total Formula Funding (ex. Rates, Split Sites & PFI)	Illustrative Total Funding Per Pupil	MFG (at + 0.5%)	MFL (£4,405 prim; £5,715 sec)	Total £ Diff vs. 22/23	Total % Diff vs. 22/23	Diff in Pupil Numbers	£APP diff vs. 22/23	% Diff £APP vs. 22/23	% Diff £APP vs. 22/23 using same pupil no.s
Primary	Green Lane Primary School	540	2,653,925	71,526	2,725,451	5,047	23,036	0	512	2,637,228	5,151	0	0	-88,223	-3.24%	-28	104	2.05%	1.80%
Primary	Greengates Primary School	198	956,383	28,501	984,884	4,974	0	0	201	1,023,844	5,094	0	0	38,960	3.96%	3	120	2.40%	2.60%
Primary	Grove House Primary School	395	1,783,292	52,132	1,835,425	4,647	0	0	393	1,873,664	4,768	0	0	38,239	2.08%	-2	121	2.60%	2.57%
Primary	Harden Primary Academy	212	904,180	26,033	930,213	4,388	0	31,798	207	915,210	4,421	3,375	10,179	-15,003	-1.61%	-5	34	0.76%	0.43%
Primary	Haworth Primary Academy	291	1,244,347	35,228	1,279,575	4,397	3,232	33,116	289	1,277,379	4,420	4,334	6,920	-2,196	-0.17%	-2	23	0.52%	0.45%
Primary	Heaton St Barnabas' CE Primary School	415	1,894,612	51,848	1,946,461	4,690	124,637	36,884	414	1,951,149	4,713	125,081	0	4,689	0.24%	-1	23	0.48%	0.47%
Primary	High Craggs Primary Leadership Academy	343	1,652,986	51,664	1,704,650	4,970	12,758	0	339	1,717,934	5,068	0	0	13,284	0.78%	-4	98	1.97%	1.88%
Primary	Hill Top CE Primary School	208	953,731	27,685	981,416	4,718	0	0	208	1,006,687	4,840	0	0	25,271	2.57%	0	121	2.57%	2.57%
Primary	Hollingwood Primary Academy	423	1,943,837	54,155	1,997,992	4,723	0	0	421	2,040,006	4,846	0	0	42,014	2.10%	-2	122	2.59%	2.56%
Primary	Holybrook Primary Academy	215	1,194,911	35,931	1,230,842	5,725	32,556	0	212	1,220,891	5,759	5,629	0	-9,951	-0.81%	-3	34	0.60%	0.45%
Primary	Holycroft Primary Academy	338	1,649,613	47,694	1,697,306	5,022	24,844	0	307	1,570,488	5,116	0	0	-126,818	-7.47%	-31	94	1.87%	1.11%
Primary	Home Farm Primary School	418	1,919,114	54,788	1,973,902	4,722	0	0	412	1,998,167	4,850	0	0	24,264	1.23%	-6	128	2.70%	2.61%
Primary	Horton Grange Primary Academy	626	3,075,993	83,285	3,159,278	5,047	0	0	618	3,201,479	5,180	0	0	42,201	1.34%	-8	134	2.65%	2.60%
Primary	Horton Park Primary Academy	437	2,345,483	64,214	2,409,697	5,514	146,694	0	431	2,394,808	5,556	101,295	0	-14,888	-0.62%	-6	42	0.77%	0.47%
Primary	Hoyle Court Primary School	301	1,283,765	37,988	1,321,753	4,391	0	10,815	286	1,283,436	4,488	0	0	-38,318	-2.90%	-15	96	2.19%	1.69%
Primary	Idle CE Primary School	425	1,812,625	48,135	1,860,760	4,378	0	185,551	422	1,865,307	4,420	6,397	153,204	4,547	0.24%	-3	42	0.96%	0.61%
Primary	Ingrow Primary School	387	1,920,342	57,803	1,978,145	5,111	61,869	0	370	1,905,717	5,151	18,910	0	-72,427	-3.66%	-17	39	0.76%	0.47%
Primary	Iqra Primary Academy	622	2,844,925	74,145	2,919,071	4,693	110,206	0	613	2,896,891	4,726	54,226	0	-22,180	-0.76%	-9	33	0.70%	0.48%
Primary	Keelham Primary School	107	545,305	14,651	559,956	5,233	38,973	0	107	566,211	5,292	32,273	0	6,255	1.12%	0	58	1.12%	0.39%
Primary	Keighley St Andrew's CE Primary School	340	1,687,406	44,827	1,732,233	5,095	0	0	325	1,704,145	5,244	0	0	-28,088	-1.62%	-15	149	2.92%	2.58%
Primary	Killinghall Primary School	623	2,882,793	77,383	2,960,176	4,751	15,447	0	620	3,007,578	4,851	0	0	47,402	1.60%	-3	99	2.09%	2.07%
Primary	Knowleswood Primary School	372	1,980,568	59,535	2,040,103	5,484	0	0	361	2,037,950	5,645	0	0	-2,152	-0.11%	-11	161	2.94%	2.75%
Primary	Lapage Primary School and Nursery	632	2,942,891	79,823	3,022,714	4,783	28,994	0	613	2,983,640	4,867	0	0	-39,074	-1.29%	-19	85	1.77%	1.64%
Primary	Laycock Primary Academy	98	610,366	15,739	626,104	6,389	63,442	0	94	608,163	6,470	48,929	0	-17,941	-2.87%	-4	81	1.27%	0.40%
Primary	Lees Primary Academy	203	881,354	25,585	906,940	4,468	15,559	8,944	208	930,115	4,472	6,734	0	23,176	2.56%	5	4	0.09%	0.43%
Primary	Ley Top Primary School	379	1,889,737	56,579	1,946,316	5,135	0	0	364	1,924,907	5,288	0	0	-21,409	-1.10%	-15	153	2.98%	2.70%
Primary	Lidget Green Primary School	559	2,697,598	71,981	2,769,579	4,955	0	0	541	2,755,133	5,093	0	0	-14,446	-0.52%	-18	138	2.79%	2.63%
Primary	Lilycroft Primary School	407	1,943,944	54,643	1,998,586	4,911	0	0	400	2,017,989	5,045	0	0	19,403	0.97%	-7	134	2.74%	2.63%
Primary	Carlton Mills Primary School	293	1,448,047	39,958	1,488,005	5,079	0	0	262	1,378,678	5,262	0	0	-109,327	-7.35%	-31	184	3.62%	2.60%
Primary	Long Lee Primary School	377	1,684,680	49,719	1,734,399	4,601	0	0	357	1,691,831	4,739	0	0	-42,569	-2.45%	-20	138	3.01%	2.60%
Primary	Low Ash Primary School	439	1,872,335	52,391	1,924,726	4,384	0	58,960	440	1,938,200	4,405	0	21,648	13,474	0.70%	1	21	0.47%	0.47%
Primary	Low Moor CE Primary School	414	1,765,710	50,391	1,816,101	4,387	0	86,352	415	1,828,639	4,406	564	50,603	12,538	0.69%	1	20	0.45%	0.46%
Primary	Lower Fields Primary School	375	1,866,565	52,983	1,919,549	5,119	0	0	362	1,906,355	5,266	0	0	-13,194	-0.69%	-13	147	2.88%	2.64%
Primary	Margaret McMillan Primary School	597	2,742,635	74,425	2,817,060	4,719	0	0	579	2,806,808	4,848	0	0	-10,252	-0.36%	-18	129	2.73%	2.59%
Primary	Marshfield Primary School	414	1,951,992	53,622	2,005,614	4,844	0	0	404	2,011,341	4,979	0	0	5,728	0.29%	-10	134	2.77%	2.61%
Primary	Menston Primary School	405	1,730,155	43,737	1,773,892	4,380	2,830	218,126	392	1,729,027	4,411	2,267	183,246	-44,865	-2.53%	-13	31	0.70%	0.57%
Primary	Merlin Top Primary Academy	304	1,603,514	48,731	1,652,245	5,435	25,285	0	305	1,676,122	5,495	0	0	23,877	1.45%	1	60	1.11%	1.14%
Primary	Miriam Lord Community Primary School	329	1,611,402	44,355	1,655,757	5,033	0	0	319	1,651,148	5,176	0	0	-4,610	-0.28%	-10	143	2.85%	2.61%
Primary	Myrtle Park Primary School	207	885,706	25,888	911,594	4,404	2,851	9,851	206	917,088	4,452	0	0	5,494	0.60%	-1	48	1.09%	1.02%
Primary	Beckfoot Nessfield Primary Academy	311	1,366,328	39,299	1,405,628	4,520	0	0	286	1,335,805	4,671	0	0	-69,822	-4.97%	-25	151	3.34%	2.54%
Primary	Newby Primary School	417	1,940,582	55,188	1,995,770	4,786	0	0	405	1,993,110	4,921	0	0	-2,660	-0.13%	-12	135	2.83%	2.64%
Primary	Newhall Park Primary School	397	1,847,945	54,183	1,902,128	4,791	0	0	389	1,915,073	4,923	0	0	12,945	0.68%	-8	132	2.75%	2.61%
Primary	Oakworth Primary Academy	413	1,761,445	46,975	1,808,420	4,379	0	159,139	399	1,763,534	4,420	5,939	120,495	-44,885	-2.48%	-14	41	0.94%	0.60%
Primary	Oldfield Primary School	57	402,577	10,152	412,729	7,241	57,226	0	54	403,933	7,480	51,938	0	-8,795	-2.13%	-3	239	3.31%	0.34%
Primary	Our Lady & St Brendan's Catholic Primary School	192	991,388	27,408	1,018,797	5,306	0	0	191	1,041,077	5,451	0	0	22,280	2.19%	-1	144	2.72%	2.66%
Primary	Our Lady of Victories Catholic Primary Academy	210	1,042,101	27,284	1,069,385	5,092	2,510	0	209	1,089,731	5,214	0	0	20,346	1.90%	-1	122	2.39%	2.33%
Primary	Oxenhope CE Primary Academy	203	872,273	25,245	897,518	4,421	0	0	196	892,067	4,551	0	0	-5,451	-0.61%	-7	130	2.94%	2.43%
Primary	The Co-op Academy Parkland	213	1,167,759	35,096	1,202,855	5,647	49,374	0	210	1,198,038	5,705	28,328	0	-4,816	-0.40%	-3	58	1.02%	0.45%
Primary	Parkwood Primary School	181	1,061,734	28,382	1,090,116	6,023	102,875	0	180	1,089,584	6,053	81,272	0	-532	-0.05%	-1	31	0.51%	0.44%
Primary	Peel Park Primary School	575	2,731,880	78,145	2,810,026	4,887	54,294	0	557	2,752,752	4,942	9,013	0	-57,274	-2.04%	-18	55	1.13%	0.65%

school / acad is modelled to be on the MFG or MFL in 23/24		2022/23 Financial Year (Actual)							2023/24 Financial Year (Illustrative Model)										
Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Phase	School	Funded Pupil No.s	Formula Funding (ex. Rates, Split Sites & PFI)	Schools Supplementary Grant	Total of Formula and Schools Supplementary Grant	Total Funding Per Pupil	MFG Allocation (at + 2.00%)	MFL (£4,265 prim; £5,525 sec)	Estimated Funded Pupil No.s Oct 2022	Illustrative Total Formula Funding (ex. Rates, Split Sites & PFI)	Illustrative Total Funding Per Pupil	MFG (at + 0.5%)	MFL (£4,405 prim; £5,715 sec)	Total £ Diff vs. 22/23	Total % Diff vs. 22/23	Diff in Pupil Numbers	£APP diff vs. 22/23	% Diff £APP vs. 22/23	% Diff £APP vs. 22/23 using same pupil no.s
Primary	Poplars Farm Primary School	324	1,508,807	42,533	1,551,340	4,788	0	0	350	1,709,337	4,884	0	0	157,997	10.18%	26	96	2.00%	2.61%
Primary	The Co-op Academy Princeville	415	2,046,050	56,269	2,102,319	5,066	0	0	371	1,942,164	5,235	0	0	-160,154	-7.62%	-44	169	3.34%	2.62%
Primary	Rainbow Primary Leadership Academy	292	1,513,914	39,675	1,553,589	5,321	89,224	0	264	1,427,786	5,408	57,150	0	-125,803	-8.10%	-28	88	1.65%	0.46%
Primary	Reevy Hill Primary School	205	1,133,634	35,216	1,168,849	5,702	12,072	0	200	1,162,093	5,810	0	0	-6,757	-0.58%	-5	109	1.91%	1.63%
Primary	Riddlesden St Mary's CE Primary	359	1,624,998	46,755	1,671,753	4,657	10,258	0	356	1,690,366	4,748	0	0	18,613	1.11%	-3	92	1.97%	1.90%
Primary	Russell Hall Primary School	204	931,029	27,637	958,667	4,699	16,858	0	204	965,354	4,732	0	0	6,688	0.70%	0	33	0.70%	0.70%
Primary	Ryecroft Primary Academy	205	1,192,797	33,260	1,226,057	5,981	109,172	0	191	1,156,185	6,053	78,818	0	-69,873	-5.70%	-14	73	1.21%	0.45%
Primary	Saltaire Primary School	412	1,757,180	48,327	1,805,507	4,382	0	112,576	414	1,823,670	4,405	0	81,004	18,163	1.01%	2	23	0.52%	0.52%
Primary	Sandal Primary School and Nursery	415	1,769,975	47,853	1,817,828	4,380	0	142,708	411	1,810,455	4,405	0	109,433	-7,373	-0.41%	-4	25	0.56%	0.56%
Primary	Sandy Lane Primary School	304	1,376,527	40,144	1,416,672	4,660	0	0	300	1,435,314	4,784	0	0	18,643	1.32%	-4	124	2.67%	2.55%
Primary	Shibden Head Primary Academy	402	1,714,530	47,697	1,762,227	4,384	0	59,891	391	1,725,457	4,413	3,102	22,116	-36,770	-2.09%	-11	29	0.67%	0.49%
Primary	Shipley CE Primary Academy	195	929,830	27,274	957,104	4,908	24,287	0	190	939,885	4,947	4,932	0	-17,219	-1.80%	-5	39	0.79%	0.43%
Primary	Shirley Manor Primary Academy	189	1,004,409	30,071	1,034,480	5,473	27,117	0	187	1,039,013	5,556	13,640	0	4,532	0.44%	-2	83	1.51%	0.44%
Primary	Silsden Primary School	612	2,610,180	71,385	2,681,565	4,382	0	197,686	595	2,623,047	4,408	2,072	143,160	-58,519	-2.18%	-17	27	0.61%	0.53%
Primary	Southmere Primary Academy	336	1,799,787	50,844	1,850,630	5,508	0	0	305	1,736,769	5,694	0	0	-113,862	-6.15%	-31	186	3.39%	2.68%
Primary	St Anne's Catholic Primary Academy	207	1,011,040	26,738	1,037,778	5,013	0	0	208	1,068,619	5,138	0	0	30,841	2.97%	1	124	2.48%	2.54%
Primary	St Anthony's Catholic Primary School (Clayton)	204	953,744	26,532	980,277	4,805	7,041	0	205	1,002,107	4,888	0	0	21,830	2.23%	1	83	1.73%	1.79%
Primary	St Anthony's Catholic Primary School (Shipley)	124	651,272	18,176	669,448	5,399	37,614	0	121	658,990	5,446	23,603	0	-10,457	-1.56%	-3	47	0.88%	0.40%
Primary	St Clare's Catholic Primary School	207	1,072,732	30,649	1,103,381	5,330	105	0	210	1,146,749	5,461	0	0	43,369	3.93%	3	130	2.45%	2.61%
Primary	St Columba's Catholic Primary School	328	1,620,191	46,553	1,666,744	5,082	0	0	313	1,638,719	5,236	0	0	-28,025	-1.68%	-15	154	3.03%	2.66%
Primary	St Cuthbert & the First Martyrs' Catholic Primary	209	1,007,886	27,277	1,035,163	4,953	0	0	206	1,048,416	5,089	0	0	13,253	1.28%	-3	136	2.76%	2.58%
Primary	St Francis' Catholic Primary School	203	919,988	25,075	945,063	4,655	13,852	0	205	962,595	4,696	0	0	17,532	1.86%	2	40	0.86%	0.99%
Primary	St James Primary Academy	254	1,329,371	38,980	1,368,350	5,387	14,439	0	251	1,375,019	5,478	0	0	6,669	0.49%	-3	91	1.69%	1.58%
Primary	St John The Evangelist Catholic Primary	200	914,235	26,569	940,804	4,704	0	0	201	969,163	4,822	0	0	28,359	3.01%	1	118	2.50%	2.57%
Primary	St John's CE Primary School	418	1,911,111	53,680	1,964,791	4,700	37,261	0	413	1,956,268	4,737	249	0	-8,523	-0.43%	-5	36	0.77%	0.68%
Primary	St Joseph's Catholic Primary School (Bingley)	199	856,824	24,687	881,511	4,430	7,942	0	194	875,709	4,514	0	0	-5,802	-0.66%	-5	84	1.90%	1.53%
Primary	St Joseph's Catholic Primary School (Bradford)	307	1,574,087	44,592	1,618,679	5,273	0	0	298	1,616,831	5,426	0	0	-1,848	-0.11%	-9	153	2.90%	2.66%
Primary	St Joseph's Catholic Primary, Keighley	283	1,323,726	37,087	1,360,812	4,809	38,316	0	294	1,415,134	4,813	10,432	0	54,321	3.99%	11	5	0.10%	0.45%
Primary	St Luke's CE Primary School	204	982,673	27,914	1,010,587	4,954	0	0	202	1,027,930	5,089	0	0	17,344	1.72%	-2	135	2.72%	2.60%
Primary	St Mary's and St Peter's Catholic	193	1,029,019	27,505	1,056,525	5,474	21,612	0	190	1,047,105	5,511	0	0	-9,420	-0.89%	-3	37	0.67%	0.48%
Primary	St Matthew's Catholic Primary School	203	1,038,670	28,221	1,066,890	5,256	7,926	0	201	1,077,342	5,360	0	0	10,452	0.98%	-2	104	1.98%	1.87%
Primary	St Matthew's CE Primary School	402	1,878,751	54,413	1,933,164	4,809	1,925	0	390	1,926,555	4,940	0	0	-6,609	-0.34%	-12	131	2.72%	2.52%
Primary	St Oswald's CE Primary Academy	373	1,934,673	52,836	1,987,509	5,328	0	0	357	1,958,282	5,485	0	0	-29,227	-1.47%	-16	157	2.95%	2.66%
Primary	St Paul's CE Primary School	201	944,147	27,261	971,408	4,833	22,920	0	195	950,324	4,873	2,799	0	-21,085	-2.17%	-6	41	0.84%	0.43%
Primary	St Philip's CE Primary Academy	199	1,025,648	28,102	1,053,750	5,295	0	0	199	1,080,841	5,431	0	0	27,091	2.57%	0	136	2.57%	2.57%
Primary	St Stephen's CE Primary School	406	1,961,059	56,267	2,017,326	4,969	0	0	394	2,013,331	5,110	0	0	-3,995	-0.20%	-12	141	2.84%	2.65%
Primary	St Walburga's Catholic Primary School	207	899,720	26,143	925,863	4,473	15,534	0	207	932,990	4,507	0	0	7,127	0.77%	0	34	0.77%	0.77%
Primary	St William's Catholic Primary School	132	738,379	21,757	760,137	5,759	0	0	117	705,870	6,033	0	0	-54,266	-7.14%	-15	274	4.77%	2.61%
Primary	St Winefride's Catholic Primary	398	1,725,219	49,689	1,774,908	4,460	0	0	395	1,807,938	4,577	0	0	33,030	1.86%	-3	117	2.63%	2.58%
Primary	Stanbury Village School	102	532,124	14,426	546,550	5,358	49,110	0	103	552,766	5,367	39,414	0	6,216	1.14%	1	8	0.16%	0.38%
Primary	Steeton Primary School	287	1,257,273	35,010	1,292,283	4,503	0	0	278	1,287,074	4,630	0	0	-5,210	-0.40%	-9	127	2.82%	2.50%
Primary	Stocks Lane Primary School	206	948,358	26,726	975,084	4,733	55,541	0	206	979,320	4,754	36,858	0	4,235	0.43%	0	21	0.43%	0.43%
Primary	Swain House Primary School	427	1,974,080	58,198	2,032,279	4,759	0	0	422	2,062,359	4,887	0	0	30,080	1.48%	-5	128	2.68%	2.61%
Primary	Thackley Primary School	419	1,787,035	48,496	1,835,531	4,381	0	119,411	419	1,845,695	4,405	0	87,029	10,164	0.55%	0	24	0.55%	0.55%
Primary	The Sacred Heart Catholic Primary Academy	143	634,868	18,319	653,187	4,568	23,178	0	136	629,977	4,632	9,993	0	-23,210	-3.55%	-7	64	1.41%	0.40%
Primary	Thorburny Primary Leadership Academy	476	2,264,735	63,905	2,328,640	4,892	0	0	459	2,309,776	5,032	0	0	-18,864	-0.81%	-17	140	2.86%	2.66%
Primary	Thornton Primary School	491	2,137,301	61,450	2,198,751	4,478	0	0	474	2,181,472	4,602	0	0	-17,279	-0.79%	-17	124	2.77%	2.56%
Primary	Thorpe Primary School	202	1,007,119	31,354	1,038,473	5,141	0	0	198	1,047,481	5,290	0	0	9,007	0.87%	-4	149	2.91%	2.66%
Primary	Trinity All Saints CE Primary School	218	984,488	30,611	1,015,098	4,656	0	0	189	919,263	4,864	0	0	-95,835	-9.44%	-29	207	4.45%	2.52%
Primary	Victoria Primary School	289	1,390,854	37,159	1,428,012	4,941	0	0	281	1,427,425	5,080	0	0	-587	-0.04%	-8	139	2.80%	2.55%

school / acad is modelled to be on the MFG or MFL in 23/24		2022/23 Financial Year (Actual)							2023/24 Financial Year (Illustrative Model)										
Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Phase	School	Funded Pupil No.s	Formula Funding (ex. Rates, Split Sites & PFI)	Schools Supplementary Grant	Total of Formula and Schools Supplementary Grant	Total Funding Per Pupil	MFG Allocation (at + 2.00%)	MFL (£4,265 prim; £5,525 sec)	Estimated Funded Pupil No.s Oct 2022	Illustrative Total Formula Funding (ex. Rates, Split Sites & PFI)	Illustrative Total Funding Per Pupil	MFG (at + 0.5%)	MFL (£4,405 prim; £5,715 sec)	Total £ Diff vs. 22/23	Total % Diff vs. 22/23	Diff in Pupil Numbers	£APP diff vs. 22/23	% Diff £APP vs. 22/23	% Diff £APP vs. 22/23 using same pupil no.s
Primary	Wellington Primary School	419	1,835,573	54,107	1,889,680	4,510	0	0	422	1,950,545	4,622	0	0	60,865	3.22%	3	112	2.49%	2.54%
Primary	Westbourne Primary School	384	1,895,671	51,954	1,947,625	5,072	0	0	368	1,921,627	5,222	0	0	-25,998	-1.33%	-16	150	2.95%	2.67%
Primary	Westminster CE Primary Academy	472	2,325,204	68,685	2,393,889	5,072	0	0	456	2,377,789	5,214	0	0	-16,100	-0.67%	-16	143	2.81%	2.62%
Primary	Whetley Primary Academy	496	2,529,257	68,633	2,597,890	5,238	0	0	464	2,501,939	5,392	0	0	-95,951	-3.69%	-32	154	2.95%	2.61%
Primary	Wibsey Primary School	632	2,791,205	82,880	2,874,085	4,548	0	0	624	2,912,403	4,667	0	0	38,318	1.33%	-8	120	2.63%	2.58%
Primary	Wilsden Primary School	305	1,300,825	36,073	1,336,898	4,383	0	78,397	282	1,255,021	4,450	12,811	40,232	-81,878	-6.12%	-23	67	1.53%	0.50%
Primary	Woodlands Primary Academy	110	569,352	16,563	585,915	5,327	36,181	0	110	588,205	5,347	24,769	0	2,289	0.39%	0	21	0.39%	0.39%
Primary	Woodside Academy	394	1,957,365	59,673	2,017,037	5,119	0	0	382	2,012,050	5,267	0	0	-4,987	-0.25%	-12	148	2.89%	2.69%
Primary	Worth Valley Primary Academy	199	1,052,537	32,933	1,085,471	5,455	13,455	0	195	1,081,193	5,545	0	0	-4,278	-0.39%	-4	90	1.65%	1.41%
Primary	Worthinghead Primary School	213	1,017,639	28,851	1,046,489	4,913	42,050	0	211	1,042,414	4,940	20,620	0	-4,075	-0.39%	-2	27	0.55%	0.44%
Primary	Wycliffe CE Primary Academy	336	1,439,660	42,320	1,481,980	4,411	6,620	104	318	1,438,199	4,523	0	0	-43,781	-2.95%	-18	112	2.54%	2.05%
Secondary	Beckfoot Academy	1,354	7,480,850	225,594	7,706,444	5,692	0	68,049	1,356	7,842,613	5,784	0	0	136,169	1.77%	2	92	1.62%	1.57%
Secondary	Beckfoot Oakbank Academy	1,412	8,673,281	272,326	8,945,607	6,335	0	0	1,443	9,386,806	6,505	0	0	441,199	4.93%	31	170	2.68%	2.61%
Secondary	Beckfoot Thornton Academy	1,309	8,184,775	252,675	8,437,451	6,446	0	0	1,318	8,725,056	6,620	0	0	287,605	3.41%	9	174	2.70%	2.62%
Secondary	Beckfoot Upper Heaton Academy	709	4,909,861	142,028	5,051,889	7,125	319,233	0	727	5,202,140	7,156	225,190	0	150,251	2.97%	18	30	0.42%	0.49%
Secondary	Belle Vue Girls' Academy	904	5,709,809	175,316	5,885,125	6,510	0	0	879	5,875,522	6,684	0	0	-9,603	-0.16%	-25	174	2.68%	2.62%
Secondary	Bingley Grammar School	1,559	8,705,869	267,182	8,973,050	5,756	0	0	1,590	9,392,552	5,907	0	0	419,502	4.68%	31	152	2.63%	2.51%
Secondary	Bradford Forster Academy	1,013	6,833,505	212,013	7,045,518	6,955	0	0	1,022	7,298,744	7,142	0	0	253,226	3.59%	9	187	2.68%	2.69%
Secondary	Bronte Girls' Academy	514	3,116,573	98,686	3,215,260	6,259	0	0	664	4,292,249	6,467	0	0	1,076,989	33.50%	150	208	3.32%	2.61%
Secondary	Buttershaw Business & Enterprise College Academy	1,437	9,225,217	294,414	9,519,631	6,625	0	0	1,454	9,881,418	6,796	0	0	361,787	3.80%	17	171	2.59%	2.64%
Secondary	Carlton Bolling College	1,630	10,427,730	320,507	10,748,237	6,594	41,791	0	1,618	10,917,196	6,747	0	0	168,959	1.57%	-12	153	2.33%	2.25%
Secondary	Carlton Keighley Academy	665	4,439,735	128,216	4,567,951	6,869	204,517	0	690	4,757,899	6,896	119,947	0	189,949	4.16%	25	26	0.38%	0.49%
Secondary	Co-op Academy Grange	1,538	10,100,408	316,543	10,416,951	6,773	0	0	1,532	10,643,422	6,947	0	0	226,471	2.17%	-6	174	2.57%	2.66%
Secondary	Dixons City Academy	884	5,324,532	161,794	5,486,326	6,206	0	0	890	5,664,458	6,365	0	0	178,132	3.25%	6	158	2.55%	2.61%
Secondary	Dixons Cottingley Academy	816	5,262,756	160,186	5,422,942	6,646	126,234	0	862	5,751,433	6,672	0	0	328,491	6.06%	46	26	0.40%	0.49%
Secondary	Dixons Kings Academy	841	5,122,551	157,070	5,279,621	6,278	0	0	832	5,362,483	6,445	0	0	82,861	1.57%	-9	168	2.67%	2.62%
Secondary	Dixons McMillan Academy	620	3,809,631	118,961	3,928,592	6,336	0	0	641	4,161,698	6,493	0	0	233,106	5.93%	21	156	2.46%	2.63%
Secondary	Dixons Trinity Academy	622	3,785,780	116,545	3,902,324	6,274	0	0	638	4,097,885	6,423	0	0	195,561	5.01%	16	149	2.38%	2.61%
Secondary	Eden Boys Leadership Academy	434	2,661,266	78,900	2,740,165	6,314	0	0	554	3,612,477	6,521	0	0	872,311	31.83%	120	207	3.28%	2.54%
Secondary	Feversham College	625	3,981,893	118,504	4,100,397	6,561	135,025	0	613	4,043,607	6,596	55,153	0	-56,789	-1.38%	-12	36	0.55%	0.48%
Secondary	Hanson School	1,432	9,156,685	291,393	9,448,077	6,598	0	0	1,433	9,700,102	6,769	0	0	252,025	2.67%	1	171	2.60%	2.63%
Secondary	Ilkley Grammar School	1,534	8,475,350	236,770	8,712,120	5,679	0	508,997	1,567	8,955,405	5,715	0	361,133	243,285	2.79%	33	36	0.63%	0.63%
Secondary	Immanuel College Academy	1,387	8,132,355	249,431	8,381,786	6,043	0	0	1,456	9,043,880	6,211	0	0	662,093	7.90%	69	168	2.79%	2.57%
Secondary	Laisterdyke Leadership Academy	830	5,583,659	174,026	5,757,685	6,937	0	0	830	5,898,359	7,106	0	0	140,674	2.44%	0	169	2.44%	2.65%
Secondary	Oasis Academy Lister Park	841	5,550,240	170,992	5,721,233	6,803	0	0	842	5,877,570	6,980	0	0	156,337	2.73%	1	178	2.61%	2.64%
Secondary	One In A Million (Free School)	372	2,575,601	80,439	2,656,040	7,140	0	0	368	2,696,394	7,327	0	0	40,354	1.52%	-4	187	2.62%	2.65%
Secondary	Parkside School	1,043	5,934,816	183,632	6,118,448	5,866	0	0	1,065	6,403,989	6,013	0	0	285,541	4.67%	22	147	2.50%	2.50%
Secondary	St Bede's & St Joseph's Catholic College	1,457	8,696,769	264,239	8,961,008	6,150	0	0	1,455	9,185,828	6,313	0	0	224,820	2.51%	-2	163	2.65%	2.60%
Secondary	The Holy Family Catholic School	748	4,710,033	140,574	4,850,607	6,485	0	0	739	4,922,669	6,661	0	0	72,061	1.49%	-9	176	2.72%	2.59%
Secondary	Titus Salt School	1,260	7,409,110	228,239	7,637,348	6,061	0	0	1,274	7,923,845	6,220	0	0	286,497	3.75%	14	158	2.61%	2.55%
Secondary	Tong Leadership Academy	852	5,805,683	184,119	5,989,802	7,030	0	0	849	6,093,645	7,177	0	0	103,842	1.73%	-3	147	2.09%	2.67%
Secondary	Trinity Academy Bradford	887	5,424,284	170,624	5,594,908	6,308	0	0	901	5,812,645	6,451	0	0	217,737	3.89%	14	144	2.28%	2.58%
		89,154	472,802,100	13,878,687	486,680,787	5,459	3,286,651	3,737,095	88,593	494,948,241	5,587	1,752,861	2,575,849	8,267,454	1.70%	-561	128	2.34%	2.01%

Key to Columns	
1	The number of reception to year 11 pupils funded in 2022/23 taken from the October 2021 Census, plus the Reception Uplift, with adjustments made for x2 newly establishing academies.
2	The Local Authority's calculated 2022/23 financial year formula funding allocation excluding business rates, split sites and PFI funding. This total also does not include any high needs, early years, post 16 funding, Growth Fund or any other grants.
3	The additional Schools Supplementary Funding Grant allocated by the DfE in 2022/23. Please note that the value here excludes any amount of the Grant that was allocated for early years and post 16 pupils.
4	The school's / academy's 2022/23 total formula plus Supplementary Grant funding (column 2 + column 3).
5	The school's / academy's 2022/23 total formula plus Supplementary Grant funding per pupil (column 2 + column 3 divided by column 1).
6	The Minimum Funding Guarantee (MFG) protection within the school's / academy's 2022/23 formula funding allocation shown in column 2. The MFG was set at + 2.00%. A zero in this column = the school / academy was funded at or above the level of the MFG and did not r

school / acad is modelled to be on the MFG or MFL in 23/24		2022/23 Financial Year (Actual)							2023/24 Financial Year (Illustrative Model)										
Phase	Column Reference (see key below)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
	School	Funded Pupil No.s	Formula Funding (ex. Rates, Split Sites & PFI)	Schools Supplementary Grant	Total of Formula and Schools Supplementary Grant	Total Funding Per Pupil	MFG Allocation (at + 2.00%)	MFL (£4,265 prim; £5,525 sec)	Estimated Funded Pupil No.s Oct 2022	Illustrative Total Formula Funding (ex. Rates, Split Sites & PFI)	Illustrative Total Funding Per Pupil	MFG (at + 0.5%)	MFL (£4,405 prim; £5,715 sec)	Total £ Diff vs. 22/23	Total % Diff vs. 22/23	Diff in Pupil Numbers	£APP diff vs. 22/23	% Diff £APP vs. 22/23	% Diff £APP vs. 22/23 using same pupil no.s
7	The top up to bring a school's / academy's 2022/23 formula funding per pupil up to the mandatory minimums of £4,265 (primary) and £5,525 (secondary). This funding is included in column 2. A zero in the column = no top up was required.																		
8	The number of reception to year 11 pupils estimated to be recorded in the October 2022 Census, with adjustments made for x2 newly establishing academies.																		
9	The Local Authority's illustrative 2023/24 financial year formula funding allocation, excluding business rates, split sites and PFI funding. This total also does not include any high needs, early years, post 16 funding, Growth Fund or any other grants. It is calculated on the pupil numbers.																		
10	The school's / academy's illustrative 2023/24 total formula funding per pupil (column 9 divided by column 8).																		
11	The Minimum Funding Guarantee (MFG) protection within the school's / academy's 2023/24 illustrative allocation shown in column 9, based on an MFG of + 0.50%. A zero in this column = the school / academy is funded at or above the level of the MFG and does not require a top up.																		
12	The top up to bring a school's / academy's 2023/24 illustrative formula funding per pupil up to the new mandatory minimums of £4,405 (primary) and £5,715 (secondary). This funding is included in column 9. A zero in this column = no top up is required.																		
13	The difference between 2023/24 illustrative and 2022/23 actual allocations (column 9 minus column 4) i.e. the impact of proposed formula funding changes incorporating estimated changes in pupil numbers but before the impact of any change in data to be recorded in the census.																		
14	The column 13 difference shown in % terms (column 9 divided into column 4).																		
15	The difference in pupil numbers (column 8 minus column 1).																		
16	The change in per pupil funding (column 10 minus column 5).																		
17	The % change in per pupil funding (column 10 divided into column 5).																		
18	The % change in per pupil funding when the 2022/23 funded pupil numbers (shown in column 1), rather than the October 2022 estimates in column 8, are used to estimate 2023/24 allocations. This shows the £app funding difference delivered by the proposals without the impact of the census.																		

Please also see Section 4 in the main consultation document for further explanation of this modelling

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Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10
Phase	School	2022/23 Actual Notional SEND Budget £	2022/23 Actual Notional SEND £Per Pupil	2023/24 Illustrative Notional SEND £ Using Current Definition	2023/24 Illustrative Notional SEND £Per Pupil Using Current Definition	2023/24 Illustrative Notional SEND £ Using New Definition	2023/24 Illustrative Notional SEND £Per Pupil Using New Definition	Difference Between Columns 5 and 3	Difference Between Columns 6 and 4	Notional No. of Pupils Supported at £6k per pupil (column 5)	Notional No. of Pupils Supported at £3k per pupil (column 5)
All Through	Appleton Academy	1,058,418	856	1,124,383	897	1,131,157	902	6,775	5	189	377
All Through	Bradford Academy	1,474,233	947	1,529,648	988	1,546,534	999	16,886	11	258	516
All Through	Bradford Girls Grammar (Free School)	716,707	719	775,669	753	753,804	732	-21,865	-21	126	251
All Through	Dixons Allerton Academy	1,315,317	805	1,370,576	840	1,352,076	828	-18,500	-11	225	451
Primary	Addingham Primary School	98,808	477	100,748	496	105,339	519	4,591	23	18	35
Primary	All Saints' CE Primary School (Bradford)	484,735	766	490,186	802	480,454	786	-9,732	-16	80	160
Primary	All Saints' CE Primary School (Ilkley)	128,769	365	133,965	382	203,353	579	69,388	198	34	68
Primary	Ashlands Primary School	155,293	450	148,030	470	184,403	585	36,372	115	31	61
Primary	Atlas School	155,545	806	153,900	841	150,716	824	-3,184	-17	25	50
Primary	Baildon CE Primary School	179,786	431	188,650	450	260,334	621	71,685	171	43	87
Primary	Bankfoot Primary School	141,993	667	148,318	696	144,459	678	-3,860	-18	24	48
Primary	Barkerend Primary Leadership Academy	399,980	794	415,110	829	406,430	811	-8,679	-17	68	135
Primary	Beckfoot Allerton Primary Academy	290,869	736	293,680	769	286,645	750	-7,035	-18	48	96
Primary	Beckfoot Heaton Primary Academy	472,511	751	494,172	786	483,439	769	-10,732	-17	81	161
Primary	Beckfoot Priestthorpe Primary School	103,768	552	106,735	577	101,597	549	-5,137	-28	17	34
Primary	Ben Rhydding Primary School	86,771	447	86,316	467	83,870	453	-2,445	-13	14	28
Primary	Blakehill Primary School	241,942	586	252,207	611	255,568	619	3,361	8	43	85
Primary	Bowling Park Primary School	585,480	954	595,406	996	587,637	983	-7,769	-13	98	196
Primary	Brackenhill Primary School	317,485	810	325,694	844	318,176	824	-7,518	-19	53	106
Primary	Burley & Woodhead CE Primary School	87,829	428	91,941	446	102,758	499	10,817	53	17	34
Primary	Burley Oaks Primary School	186,562	456	189,656	475	257,520	645	67,864	170	43	86
Primary	Byron Primary Academy	476,254	777	488,030	811	476,659	792	-11,371	-19	79	159
Primary	Carrwood Primary School	292,658	1,009	280,163	1,057	278,667	1,052	-1,496	-6	46	93
Primary	Cavendish Primary School	362,667	872	376,846	912	371,357	899	-5,488	-13	62	124
Primary	Christ Church Primary Academy	131,872	758	145,052	797	142,777	784	-2,275	-13	24	48
Primary	Clayton St John's CE Primary Academy	282,196	763	296,139	796	287,913	774	-8,226	-22	48	96
Primary	Clayton Village Primary School	156,608	753	161,224	783	155,789	756	-5,436	-26	26	52
Primary	Copthorne Primary Academy	367,165	862	378,018	896	369,135	875	-8,883	-21	62	123
Primary	Cottingley Village Primary School	194,254	468	203,054	490	225,963	546	22,908	55	38	75
Primary	Crossflatts Primary School	236,207	557	246,728	581	283,587	667	36,859	87	47	95
Primary	Crossley Hall Primary School	555,342	906	572,495	943	561,223	925	-11,272	-19	94	187
Primary	Cullingworth Village Primary Academy	164,534	517	171,145	540	187,546	592	16,401	52	31	63
Primary	Denholme Primary Academy	125,830	666	128,694	696	124,141	671	-4,554	-25	21	41
Primary	Dixons Manningham Primary Academy	326,284	850	324,540	887	318,804	871	-5,736	-16	53	106
Primary	Dixons Marchbank Academy	277,472	662	289,886	692	281,031	671	-8,855	-21	47	94
Primary	Dixons Music Primary	239,568	580	250,085	606	240,131	581	-9,955	-24	40	80
Primary	East Morton CE Primary Academy	111,267	545	116,287	567	109,738	535	-6,549	-32	18	37
Primary	Eastburn Junior and Infant School	120,770	572	122,687	596	116,169	564	-6,517	-32	19	39
Primary	Eastwood Primary Academy	287,156	740	293,815	773	286,304	753	-7,510	-20	48	95
Primary	Eldwick Primary School	238,017	455	245,177	474	343,704	665	98,527	191	57	115
Primary	Fagley Primary School	206,337	969	217,366	1,011	214,673	998	-2,693	-13	36	72
Primary	Farfield Primary	365,353	939	361,079	984	357,765	975	-3,314	-9	60	119
Primary	Farnham Primary Academy	346,876	830	354,777	863	346,339	843	-8,438	-21	58	115
Primary	Fearnville Primary Academy	346,613	1,087	350,315	1,134	346,881	1,123	-3,433	-11	58	116
Primary	Feversham Primary Academy	298,994	742	303,693	775	296,428	756	-7,265	-19	49	99
Primary	Foxhill Primary School	94,323	458	99,587	479	95,179	458	-4,408	-21	16	32
Primary	Frizinghall Primary School	316,918	834	319,239	867	310,123	843	-9,116	-25	52	103
Primary	Girlington Primary School	349,579	842	359,057	878	351,224	859	-7,833	-19	59	117
Primary	Glenaire Primary School	123,028	724	118,418	759	115,613	741	-2,805	-18	19	39
Primary	Green Lane Primary School	449,762	833	445,067	869	436,622	853	-8,445	-16	73	146
Primary	Greengates Primary School	145,859	737	154,795	770	150,949	751	-3,845	-19	25	50
Primary	Grove House Primary School	296,304	750	307,615	783	298,917	761	-8,698	-22	50	100
Primary	Harden Primary Academy	101,346	478	103,287	499	101,621	491	-1,666	-8	17	34
Primary	Haworth Primary Academy	170,893	587	176,789	612	171,720	594	-5,068	-18	29	57
Primary	Heaton St Barnabas' CE Primary School	240,094	579	250,565	605	240,055	580	-10,511	-25	40	80
Primary	High Craggs Primary Leadership Academy	255,459	745	265,259	782	260,261	768	-4,998	-15	43	87
Primary	Hill Top CE Primary School	136,031	654	142,029	683	137,301	660	-4,727	-23	23	46
Primary	Hollingwood Primary Academy	342,318	809	354,604	842	345,252	820	-9,352	-22	58	115
Primary	Holybrook Primary Academy	208,451	970	215,350	1,016	213,692	1,008	-1,658	-8	36	71
Primary	Holycroft Primary Academy	253,445	750	240,958	785	235,702	768	-5,256	-17	39	79
Primary	Home Farm Primary School	337,456	807	346,743	842	338,476	822	-8,268	-20	56	113
Primary	Horton Grange Primary Academy	597,240	954	613,507	993	602,153	974	-11,353	-18	100	201
Primary	Horton Park Primary Academy	369,894	846	382,103	887	376,929	875	-5,174	-12	63	126
Primary	Hoyle Court Primary School	167,225	556	166,213	581	158,797	555	-7,416	-26	26	53
Primary	Idle CE Primary School	179,358	422	186,487	442	247,340	586	60,853	144	41	82
Primary	Ingrow Primary School	309,000	798	309,958	838	305,058	824	-4,900	-13	51	102
Primary	Iqra Primary Academy	363,019	584	374,351	611	361,544	590	-12,807	-21	60	121
Primary	Keelham Primary School	51,753	484	53,991	505	50,780	475	-3,211	-30	8	17
Primary	Keighley St Andrew's CE Primary School	310,179	912	308,220	948	301,761	928	-6,459	-20	50	101
Primary	Killinghall Primary School	510,874	820	529,241	854	517,202	834	-12,039	-19	86	172
Primary	Knowleswood Primary School	396,532	1,066	402,501	1,115	400,389	1,109	-2,112	-6	67	133
Primary	Lapage Primary School and Nursery	438,631	694	444,645	725	432,482	706	-12,162	-20	72	144
Primary	Laycock Primary Academy	71,509	730	71,769	764	70,411	749	-1,359	-14	12	23

Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10
Phase	School	2022/23 Actual Notional SEND Budget £	2022/23 Actual Notional SEND £Per Pupil	2023/24 Illustrative Notional SEND £ Using Current Definition	2023/24 Illustrative Notional SEND £Per Pupil Using Current Definition	2023/24 Illustrative Notional SEND £ Using New Definition	2023/24 Illustrative Notional SEND £Per Pupil Using New Definition	Difference Between Columns 5 and 3	Difference Between Columns 6 and 4	Notional No. of Pupils Supported at £6k per pupil (column 5)	Notional No. of Pupils Supported at £3k per pupil (column 5)
Primary	Lees Primary Academy	98,585	486	105,596	508	99,476	478	-6,120	-29	17	33
Primary	Ley Top Primary School	325,020	858	327,052	898	322,723	887	-4,329	-12	54	108
Primary	Lidget Green Primary School	489,197	875	492,992	911	483,298	893	-9,694	-18	81	161
Primary	Lilycroft Primary School	311,664	766	320,007	800	312,615	782	-7,393	-18	52	104
Primary	Carlton Mills Primary School	239,304	817	223,115	852	217,905	832	-5,210	-20	36	73
Primary	Long Lee Primary School	277,135	735	274,024	768	266,415	746	-7,608	-21	44	89
Primary	Low Ash Primary School	276,760	630	288,982	657	287,582	654	-1,400	-3	48	96
Primary	Low Moor CE Primary School	215,159	520	225,853	544	239,244	576	13,391	32	40	80
Primary	Lower Fields Primary School	362,378	966	364,547	1,007	359,531	993	-5,016	-14	60	120
Primary	Margaret McMillan Primary School	468,931	785	473,685	818	461,124	796	-12,561	-22	77	154
Primary	Marshfield Primary School	293,485	709	299,192	741	291,512	722	-7,680	-19	49	97
Primary	Menston Primary School	172,492	426	173,984	444	248,818	635	74,834	191	41	83
Primary	Merlin Top Primary Academy	283,018	931	297,649	976	295,083	967	-2,567	-8	49	98
Primary	Miriam Lord Community Primary School	270,588	822	273,538	857	267,566	839	-5,973	-19	45	89
Primary	Myrtle Park Primary School	105,381	509	109,437	531	103,097	500	-6,340	-31	17	34
Primary	Beckfoot Nessfield Primary Academy	213,117	685	204,248	714	197,084	689	-7,164	-25	33	66
Primary	Newby Primary School	299,396	718	304,087	751	296,535	732	-7,551	-19	49	99
Primary	Newhall Park Primary School	300,495	757	307,820	791	300,513	773	-7,308	-19	50	100
Primary	Oakworth Primary Academy	199,595	483	201,279	504	246,974	619	45,695	115	41	82
Primary	Oldfield Primary School	37,611	660	37,154	688	35,720	661	-1,434	-27	6	12
Primary	Our Lady & St Brendan's Catholic Primary School	158,490	825	164,517	861	161,664	846	-2,852	-15	27	54
Primary	Our Lady of Victories Catholic Primary Academy	174,657	832	180,547	864	175,987	842	-4,560	-22	29	59
Primary	Oxenhope CE Primary Academy	123,118	606	123,566	630	117,365	599	-6,200	-32	20	39
Primary	The Co-op Academy Parkland	193,138	907	199,676	951	197,548	941	-2,128	-10	33	66
Primary	Parkwood Primary School	162,953	900	169,335	941	166,758	926	-2,577	-14	28	56
Primary	Peel Park Primary School	445,749	775	451,620	811	441,648	793	-9,972	-18	74	147
Primary	Poplars Farm Primary School	233,078	719	262,910	751	255,866	731	-7,045	-20	43	85
Primary	The Co-op Academy Princeville	376,554	907	350,669	945	343,964	927	-6,705	-18	57	115
Primary	Rainbow Primary Leadership Academy	225,564	772	212,836	806	207,675	787	-5,161	-20	35	69
Primary	Reevy Hill Primary School	208,259	1,016	212,819	1,064	211,258	1,056	-1,561	-8	35	70
Primary	Riddlesden St Mary's CE Primary	257,604	718	266,406	748	257,773	724	-8,633	-24	43	86
Primary	Russell Hall Primary School	129,830	636	135,553	664	130,155	638	-5,398	-26	22	43
Primary	Ryecroft Primary Academy	180,688	881	176,508	924	174,673	915	-1,835	-10	29	58
Primary	Saltaire Primary School	226,541	550	237,407	573	264,082	638	26,675	64	44	88
Primary	Sandal Primary School and Nursery	215,360	519	222,436	541	262,512	639	40,076	98	44	88
Primary	Sandy Lane Primary School	220,558	726	227,008	757	220,064	734	-6,944	-23	37	73
Primary	Shibden Head Primary Academy	261,903	652	264,969	678	264,351	676	-617	-2	44	88
Primary	Shingley CE Primary Academy	138,602	711	140,872	741	135,929	715	-4,944	-26	23	45
Primary	Shirley Manor Primary Academy	143,276	758	149,115	797	147,258	787	-1,857	-10	25	49
Primary	Silsden Primary School	376,877	616	381,546	641	432,375	727	50,829	85	72	144
Primary	Southmere Primary Academy	340,154	1,012	322,373	1,057	318,946	1,046	-3,427	-11	53	106
Primary	St Anne's Catholic Primary Academy	160,972	778	168,029	808	162,900	783	-5,129	-25	27	54
Primary	St Anthony's Catholic Primary School (Clayton)	148,237	727	154,939	756	149,910	731	-5,029	-25	25	50
Primary	St Anthony's Catholic Primary School (Shingley)	71,157	574	72,735	601	70,105	579	-2,630	-22	12	23
Primary	St Clare's Catholic Primary School	183,590	887	194,325	925	191,122	910	-3,203	-15	32	64
Primary	St Columba's Catholic Primary School	276,062	842	275,297	880	270,742	865	-4,555	-15	45	90
Primary	St Cuthbert & the First Martyrs' Catholic Primary	149,282	714	153,236	744	148,607	721	-4,629	-22	25	50
Primary	St Francis' Catholic Primary School	134,409	662	141,002	688	135,352	660	-5,650	-28	23	45
Primary	St James Primary Academy	243,980	961	251,821	1,003	248,684	991	-3,138	-13	41	83
Primary	St John The Evangelist Catholic Primary	117,490	587	123,509	614	118,949	592	-4,560	-23	20	40
Primary	St John's CE Primary School	281,145	673	290,487	703	282,530	684	-7,957	-19	47	94
Primary	St Joseph's Catholic Primary School (Bingley)	104,468	525	106,133	547	100,175	516	-5,958	-31	17	33
Primary	St Joseph's Catholic Primary School (Bradford)	275,200	896	279,008	936	274,720	922	-4,288	-14	46	92
Primary	St Joseph's Catholic Primary, Keighley	182,893	646	198,701	676	192,741	656	-5,960	-20	32	64
Primary	St Luke's CE Primary School	155,545	762	160,573	795	156,385	774	-4,188	-21	26	52
Primary	St Mary's and St Peter's Catholic	169,574	879	173,791	915	170,236	896	-3,555	-19	28	57
Primary	St Matthew's Catholic Primary School	182,074	897	187,609	933	184,188	916	-3,421	-17	31	61
Primary	St Matthew's CE Primary School	300,406	747	304,726	781	297,803	764	-6,923	-18	50	99
Primary	St Oswald's CE Primary Academy	348,966	936	348,389	976	343,571	962	-4,818	-13	57	115
Primary	St Paul's CE Primary School	124,113	617	125,922	646	121,528	623	-4,394	-23	20	41
Primary	St Philip's CE Primary Academy	161,942	814	168,754	848	164,756	828	-3,998	-20	27	55
Primary	St Stephen's CE Primary School	336,113	828	340,769	865	334,167	848	-6,602	-17	56	111
Primary	St Walburga's Catholic Primary School	103,332	499	108,021	522	102,129	493	-5,892	-28	17	34
Primary	St William's Catholic Primary School	118,382	897	109,638	937	107,839	922	-1,800	-15	18	36
Primary	St Winefride's Catholic Primary	251,432	632	260,725	660	251,970	638	-8,755	-22	42	84
Primary	Stanbury Village School	47,635	467	50,240	488	47,036	457	-3,204	-31	8	16
Primary	Steeton Primary School	195,007	679	196,392	706	188,640	679	-7,753	-28	31	63
Primary	Stocks Lane Primary School	110,571	537	115,586	561	109,820	533	-5,766	-28	18	37
Primary	Swain House Primary School	350,986	822	362,050	858	354,186	839	-7,864	-19	59	118
Primary	Thackley Primary School	227,663	543	237,355	566	266,869	637	29,514	70	44	89
Primary	The Sacred Heart Catholic Primary Academy	55,350	387	55,087	405	50,601	372	-4,486	-33	8	17
Primary	Thornbury Primary Leadership Academy	346,075	727	349,386	761	342,213	746	-7,173	-16	57	114
Primary	Thornton Primary School	359,933	733	362,144	764	351,491	742	-10,653	-22	59	117
Primary	Thorpe Primary School	148,477	735	152,862	772	150,032	758	-2,830	-14	25	50
Primary	Trinity All Saints CE Primary School	135,877	623	123,368	653	118,682	628	-4,686	-25	20	40
Primary	Victoria Primary School	237,105	820	239,634	853	233,112	830	-6,522	-23	39	78

Column Reference (see key below)		1	2	3	4	5	6	7	8	9	10
Phase	School	2022/23 Actual Notional SEND Budget £	2022/23 Actual Notional SEND £Per Pupil	2023/24 Illustrative Notional SEND £ Using Current Definition	2023/24 Illustrative Notional SEND £Per Pupil Using Current Definition	2023/24 Illustrative Notional SEND £ Using New Definition	2023/24 Illustrative Notional SEND £Per Pupil Using New Definition	Difference Between Columns 5 and 3	Difference Between Columns 6 and 4	Notional No. of Pupils Supported at £6k per pupil (column 5)	Notional No. of Pupils Supported at £3k per pupil (column 5)
Primary	Wellington Primary School	295,980	706	311,035	737	300,717	713	-10,318	-24	50	100
Primary	Westbourne Primary School	316,466	824	316,643	860	310,702	844	-5,941	-16	52	104
Primary	Westminster CE Primary Academy	410,326	869	414,521	909	407,429	893	-7,092	-16	68	136
Primary	Whetley Primary Academy	461,825	931	450,275	970	442,427	954	-7,849	-17	74	147
Primary	Wibsey Primary School	495,501	784	510,498	818	497,360	797	-13,138	-21	83	166
Primary	Wilsden Primary School	153,955	505	148,542	527	159,262	565	10,720	38	27	53
Primary	Woodlands Primary Academy	56,399	513	59,167	538	56,185	511	-2,982	-27	9	19
Primary	Woodside Academy	355,376	902	360,736	944	356,081	932	-4,655	-12	59	119
Primary	Worth Valley Primary Academy	166,076	835	170,951	877	168,976	867	-1,976	-10	28	56
Primary	Worthinghead Primary School	134,174	630	139,016	659	134,398	637	-4,618	-22	22	45
Primary	Wycliffe CE Primary Academy	219,688	654	216,815	682	208,404	655	-8,411	-26	35	69
Secondary	Beckfoot Academy	898,390	664	937,510	691	833,888	615	-103,622	-76	139	278
Secondary	Beckfoot Oakbank Academy	1,223,453	866	1,303,799	904	1,286,588	892	-17,211	-12	214	429
Secondary	Beckfoot Thornton Academy	1,217,564	930	1,276,937	969	1,261,734	957	-15,203	-12	210	421
Secondary	Beckfoot Upper Heaton Academy	689,835	973	736,408	1,013	736,154	1,013	-254	0	123	245
Secondary	Belle Vue Girls' Academy	775,048	857	785,794	894	776,710	884	-9,084	-10	129	259
Secondary	Bingley Grammar School	1,067,232	685	1,135,547	714	1,037,790	653	-97,758	-61	173	346
Secondary	Bradford Forster Academy	1,063,567	1,050	1,117,822	1,094	1,148,604	1,124	30,782	30	191	383
Secondary	Bronte Girls' Academy	328,954	640	448,295	675	443,748	669	-4,547	-7	74	148
Secondary	Buttershaw Business & Enterprise College Academy	1,382,810	962	1,457,901	1,003	1,474,832	1,014	16,931	12	246	492
Secondary	Carlton Bolling College	1,518,256	931	1,570,947	971	1,572,227	972	1,280	1	262	524
Secondary	Carlton Keighley Academy	633,669	953	683,884	991	672,279	974	-11,605	-17	112	224
Secondary	Co-op Academy Grange	1,418,309	922	1,473,592	962	1,502,331	981	28,738	19	250	501
Secondary	Dixons City Academy	622,984	705	655,381	736	629,337	707	-26,044	-29	105	210
Secondary	Dixons Cottingley Academy	726,002	890	800,228	928	790,349	917	-9,879	-11	132	263
Secondary	Dixons Kings Academy	605,654	720	626,399	753	608,441	731	-17,959	-22	101	203
Secondary	Dixons McMillan Academy	448,532	723	484,823	756	474,304	740	-10,519	-16	79	158
Secondary	Dixons Trinity Academy	432,746	696	463,840	727	448,524	703	-15,316	-24	75	150
Secondary	Eden Boys Leadership Academy	330,641	762	441,434	797	425,195	768	-16,238	-29	71	142
Secondary	Feversham College	449,927	720	461,080	752	448,444	732	-12,636	-21	75	149
Secondary	Hanson School	1,359,040	949	1,417,102	989	1,428,295	997	11,193	8	238	476
Secondary	Ilkley Grammar School	885,702	577	943,183	602	958,619	612	15,436	10	160	320
Secondary	Immanuel College Academy	1,087,574	784	1,191,268	818	1,135,102	780	-56,166	-39	189	378
Secondary	Laisterdyke Leadership Academy	850,482	1,025	885,116	1,066	899,718	1,084	14,602	18	150	300
Secondary	Oasis Academy Lister Park	858,051	1,020	894,083	1,062	901,429	1,071	7,345	9	150	300
Secondary	One In A Million (Free School)	386,336	1,039	397,911	1,081	406,505	1,105	8,595	23	68	136
Secondary	Parkside School	783,514	751	833,148	782	770,391	723	-62,756	-59	128	257
Secondary	St Bede's & St Joseph's Catholic College	1,123,492	771	1,170,525	804	1,122,288	771	-48,237	-33	187	374
Secondary	The Holy Family Catholic School	728,864	974	748,770	1,013	730,171	988	-18,600	-25	122	243
Secondary	Titus Salt School	1,014,666	805	1,068,805	839	1,015,965	797	-52,840	-41	169	339
Secondary	Tong Leadership Academy	918,390	1,078	950,970	1,120	975,696	1,149	24,726	29	163	325
Secondary	Trinity Academy Bradford	750,693	846	793,672	881	772,136	857	-21,535	-24	129	257
		69,253,430		71,788,176		71,290,733		-497,443			

Key to Columns

1	The actual 2022/23 financial year Notional SEND Budget, as published by the Authority in February 2022.
2	The actual 2022/23 financial year Notional SEND Budget, as published by the Authority in February 2022, expressed as an amount per pupil.
3	Illustratively, what the 2023/24 Notional SEND would be if we continued to use the current definition. This is calculated using the same information as used to produce Appendix 1a.
4	Illustratively, what the 2023/24 Notional SEND Budget would be if we continued to use the current definition, expressed as an amount per pupil.
5	Illustratively, what the 2023/24 Notional SEND Budget would be if we use the proposed new definition. This is calculated using the same information as used to produce Appendix 1a.
6	Illustratively, what the 2023/24 Notional SEND Budget would be if we used the proposed new definition, expressed as an amount per pupil.
7	The difference between columns 5 and 3 i.e. the difference in cash budget between using the new vs. current definition.
8	The difference between columns 6 and 4 i.e. the difference in per pupil funding between using the new vs. current definition.
9	For illustration, how many pupils the new definition illustratively would support (column 5) if every pupil that required additional support cost £6,000.
10	For illustration, how many pupils the new definition illustratively would support (column 5) if every pupil that required additional support cost £3,000.

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SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks the Forum to consider the consultation document, which outlines the formula approach that the Authority proposes to use to delegate High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year April 2023 to March 2024.

Date (s) of any Previous Discussion at the Forum

A report outlining the developing proposals for 2023/24 funding arrangements was presented to the Schools Forum on 14 September.

Background / Context

Please see Appendix 1 (the consultation document itself).

Details of the Item for Consideration

Each autumn the Local Authority, with the agreement of the Schools Forum, publishes three separate consultations on DSG management and formula funding arrangements for the following year.

Appendix 1 represents the formal consultation document on arrangements for the formula approach that Bradford Council proposes to use to delegate Dedicated Schools Grant High Needs Block funding to high needs providers, mainstream schools and academies and other settings in the 2023/24 financial year April 2023 to March 2024. This is known, and referred to, as our 'Place-Plus' system.

Forum Members are not asked to give their final views (final recommendations) for 2023/24 at this meeting. Members are asked to approve the publication of the documentation for consultation. The Forum will be asked to review responses to this consultation in December prior to making final recommendations on 11 January 2023.

The proposed approach to the uplifting of the values allocated by the Banded Model will be discussed with District Achievement Partnership on 15 November.

The consultation document includes a draft indicative list of places planned to be commissioned by the Authority in 2023/24 in Bradford-located settings. The annual sufficiency report will be presented to the Forum at the next meeting in December.

Implications for the Dedicated Schools Grant (DSG) (if any)

As set out in Appendix 1.

Recommendations

The Schools Forum is asked to agree that the consultation document (Document OY Appendix 1) is published.

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – High Needs Funding 2023/24 Consultation

Contact Officer (name, telephone number and email address)

Dawn Haigh, Principal Finance Officer (Schools)
01274 433775
dawn.haigh@bradford.gov.uk

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Document OY App 1 - INFORMATION & CONSULTATION ON THE FORMULA FUNDING OF HIGH NEEDS PROVISION FOR THE 2023/24 FINANCIAL YEAR

1. Introduction & Summary

1.1 This consultation document is written to set out, and to collect views on, the formula approach that Bradford Council proposes to use to delegate Dedicated Schools Grant (DSG) High Needs Block funding to high needs providers, mainstream schools and academies and to other settings in the 2023/24 financial year April 2023 to March 2024. This is known, and referred to, as our 'Place-Plus' system and has two parts: a) core (or place-element) funding and b) top-up (or plus) funding.

1.2 In response to its national Special Educational Needs and Disabilities (SEND) and Alternative Provision (AP) Review, which was commissioned in September 2019, the Department for Education (DfE) published on 29 March 2022 an initial outcomes and consultation document. This document can be found [here](#). The consultation closed in July. As this Review will be very significant to the future of high needs funding, it is helpful to summarise the main messages from the Review so far. So, focusing on the financial / high needs funding aspects of the Review:

- The Review focuses very strongly on supporting (improving) the inclusion of children and young people with additional needs in mainstream settings, and on universal provision / early intervention to support their needs. The Review aims to reduce the use of / reliance on Education Health and Care Plans (EHCPs), as well as on specialist places (when needs can be appropriately met in mainstream). In driving this, and in seeking greater consistency, there will be clearer guidance on what settings must do (what responsibilities they have within universal provision) and when and in what circumstances to use the EHCP and alternative provision routes of support. There will be new national SEND standards, covering early years to post 16, which set out how needs are to be identified and assessed, how agencies work together, what provision is appropriate for different types of needs, the processes for accessing support, standards for co-production and for communication, as well as for transitions. There will also be a new national Special Educational Needs Co-ordinator (SENCO) qualification.
- The Review focuses very strongly on alternative provision (AP). The DfE proposes that all authorities create and distribute an alternative provision specific budget within their High Needs Blocks. This budget would be separated into 3 tiers (mainstream; time limited; transitional), with a focus on universal provision and on early intervention. Authorities will be required to allocate this alternative provision budget in accordance with a local plan. Alongside this, alternative provision funding will be managed on a multi-year basis, with the link broken between funding and provider numbers on roll (giving potential for multi-year fixed budgets).
- The clear aim of the DfE is that early intervention, supported by the funds allocated within the Schools and Early Years Blocks (mainstream formula funding that is allocated already to schools, academies and to other settings via the National Funding Formula and the Early Years Single Funding Formula), as well as by targeted funds allocated by the High Needs Block, will reduce the need for spending on additional statutory support, and will also help to reduce the escalation of needs to higher levels of spending. This is viewed by the DfE as an important component in managing the financial pressures that are currently felt by local authorities within their High Needs Blocks. To this end, another clear cross-cutting aim of the Review is to reduce the use, as well as the cost, of independent / non-maintained placements, where local more cost efficient specialist places should be available.

- In seeking consistency, and to ensure / improve the appropriateness of funding levels, the Review proposes to introduce a national framework for the banding of SEND top-up funding ('price tariffs'), with this framework matched to levels of need and types of education provision. This potentially moves the high needs funding system towards a national funding formula. This will be a particularly complicated change to achieve, and may have significant implications for all settings in Bradford that access top-up funding. Quite significantly, the Review suggests that non-maintained / independent provisions will be brought into this national system. Also significantly, the DfE wishes to bring early years into national funding frameworks. This may then have implications for the Early Years Block, the Early Years Single Formula Funding and for the Early Years SEND Inclusion Fund.
- The Review proposes significant additional DfE scrutiny and accountability mechanisms – via local funding agreements (linked to a local inclusion plan), new Local SEND Partnerships and via Regions Groups - on the way authorities plan and manage their High Needs Blocks and their SEND support and Alternative Provision, with a clear focus on improving value for money and outcomes for children and young people. There appears to be significantly greater potential for authorities to be directed on (or for the DfE to intervene to control) High Needs Block spending, where approaches are deemed to represent poor value for money and / or are not achieving improved outcomes for children and young people.
- The Review seeks to encourage a greater level of commissioning of provision within regions, rather than by individual authorities, especially for Further Education.
- The Review seeks to improve and to more standardise EHCP assessment processes, with multiple aims, including to improve the speed of assessment.
- The DfE states that the Review recognises that education, health and social care need to work together effectively. New Local SEND Partnerships will be established, which will bring together education, health and social care, alongside a clearer definition of responsibilities and a set of national standards. The DfE also states that analysis will be commissioned, to better understand the support that children and young people with SEND need from the health workforce, so that meeting these needs is a focus in health workforce planning. The Review also states that the DfE will mandate the use of local multi-agency assessment and placement panels.
- The DfE has confirmed that it is looking closely at the 'key levers' of the national Place-Plus funding system. The Review document as published however, has little information, which enables us to judge what changes might be made (and when) or to assess their impact. Further consultation is to come.
 - The DfE confirms that it is looking at the appropriateness of the 'threshold' (element 2) set at a value of £6,000. Any change in this threshold will have implications for the High Needs Block, as well as for the budgets of all settings. We assume that the DfE is also closely reviewing the value of the place-element funding, which is received by specialist settings.
 - The DfE confirms that a standardised calculation of Notional SEND budgets will be implemented, at a point in the future, for mainstream primary and secondary schools and academies. This is an extension of the hard National Funding Formula.

1.3 Further consultation, especially on changes to high needs funding mechanisms, is expected. In terms of timescales for implementation, in its recent messaging, the DfE has stated that the SEND and AP Review represents a longer-term programme of change. The DfE's High Needs Block operational guidance for the 2023/24 financial year has confirmed that the values of place-element funding (£10,000 and £6,000), and the positions of the main 'levers' of the high needs place-plus funding system, remain unchanged. Local authorities continue to hold responsibility for calculating and allocating top-up funding. This means that any changes in High Needs Block formula funding, that may come from the national Review, will now not be implemented before April 2024 at the earliest, and following further consultations to come. The DfE has however, provided some further guidance on Notional SEND budgets for 2023/24, which is picked up within this consultation.

1.4 In introducing our consultation on our proposals for 2023/24 financial year high needs formula funding arrangements, we would like to remind all settings that Bradford Council introduced, at April 2020, a new Banded Model for the allocation of 'top-up' funding for Education Health and Care Plans (EHCPs). This model replaced our previous 'Ranges Model' and significantly uplifted the funding allocated for EHCPs across all settings. EHCP top-up funding has been uplifted in each year since, and additionally in 2022/23 to pass through the DfE's Schools Supplementary Grant funding. The Banded Model continues to include protections, which ensure that no EHCP that was in place on 1 April 2020 has reduced in value as a result of funding model change. We also introduced at April 2020 a new Day Rate Model for the funding of alternative provision for pupils permanently excluded. Funding allocated via this Day Rate Model has been uplifted in each year since, and additionally in 2022/23 to pass through the DfE's Schools Supplementary Grant funding.

1.5 It is our intention to continue to use these two now established funding models to allocate top-up funding to settings in Bradford in 2023/24. In quick summary, overall, we propose the following for 2023/24. To:

- Continue to allocate top-up funding using our existing EHCP Banded Model and Day Rate Model, uplifting the values of the top-up funding allocated by these two models. Please see sections 6 and 8.
- Continue the setting-led need factors as are currently applied in 2022/23 in the funding of specialist provisions. Please see section 7.
- Continue to allocate the former Teacher Pay and Pension Grants, separately from top-up funding, using the method and values we used in 2022/23. Please see section 9.
- Amend our definition of Notional SEND budgets for mainstream schools and academies in 2023/24. Please see Section 10.
- Continue for an additional year the amended SEND Funding Floor mechanism that we introduced in 2021/22, in support of Element 2 funding for SEND and EHCPs in mainstream primary and secondary settings. However, we propose to adjust (to increase) the thresholds that are used to calculate this Floor, in seeking to control the cost of this mechanism and to retain the Floor's original purpose, which is to support a minority of schools and academies that have significantly greater numbers of pupils on roll with EHCPs. Please see section 11.

1.6 In presenting the values of uplifts that are proposed in rates of funding, we must add the caveat that these uplifts are still subject to a final affordability check, which will take place following the closure of this consultation and prior to asking the Schools Forum to give its final formal feedback in January 2023. As such, although we set out here the rates of funding we anticipate will be used in 2023/24, subject to the responses to this consultation, settings should still view these rates at this time as indicative and subject to change.

1.7 We would like to remind settings that our high needs formula funding arrangements continue to operate in the context of recent and continuing wider changes in Bradford, including:

- The continued creation of additional specialist places.
- The development and expansion of Local Authority-led resourced provisions in mainstream primary and secondary schools and academies.
- The continued growth in the numbers of pupils with EHCPs (including in mainstream settings).
- The 'restructuring' of our PRUs and other alternative provisions.
- The re-alignment of responsibilities, between the High Needs Block and mainstream schools and academies, for the funding of alternative provision that is commissioned by mainstream schools and academies.
- Other support service delivery changes, including the amalgamation of Bradford's hospital education, Tracks and medical home tuition provisions into a single Local Authority managed service.

1.8 We would like to emphasise that our high needs formula funding arrangements must also now operate in the context of the DfE's SEND and Alternative Provision Review. Although the details of the future changes in funding systems, that are indicated by the Review's publications so far, are still to be known, the Review does strongly indicate an increased focus on early intervention and on mainstream inclusion. As such, we must ensure that our funding systems continue to support further movement in this direction, and schools, academies and other settings must begin to consider the consequences of the Review and begin to plan their provisions and budget accordingly.

1.9 The deadline for responses to this consultation is **Tuesday 29 November 2022**. Please address all questions and responses to Dawn Haigh 01274 433775 dawn.haigh@bradford.gov.uk. A response form is included at Appendix 6. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response. Please access the web-based questionnaire [here](#).

2. Background - High Needs Block and National Funding Formula

2.1 All local authorities are following a direction of travel set by the Department for Education (DfE) towards National Funding Formula (NFF). Significant changes to the way high needs provision is funded were implemented by the DfE in the 2013/14 financial year. These changes, now well established, affected activities funded by the High Needs Block (HNB), which is a specific block of monies within the Dedicated Schools Grant (the DSG) that amounts in 2023/24 to about 17% of the overall DSG resources that will be available to Bradford Council.

2.2 Unlike for mainstream primary and secondary schools and academies, that are funded within the Schools Block of the DSG, the DfE's National Funding Formula reforms have not so far introduced a provider-level national formula for High Needs Block funded settings. Local authorities continue in 2023/24 to have full responsibilities for determining their own High Needs Block formula funding matters. Authorities are required however, to comply with Regulations and with the DSG's Conditions of Grant.

2.3 The high needs funding system supports provision for children and young people with Special Educational Needs and Disabilities (SEND), in line with the Children and Families Act 2014. High Needs Block DSG funding is also allocated to support good quality Alternative Provision for pre-16 pupils who cannot receive education in schools. The Children and Families Act 2014 extended the statutory duties local authorities hold relating to SEND across the 0 to 25 age range. Therefore, Bradford Council has a key role in determining the funding that is given to schools, academies and other providers to meet the needs of children and young people with SEND. Schools, academies and other providers also have duties under the Act, in particular a duty to co-operate with their local authorities on arrangements for children and young people with SEND.

2.4 On current estimates, our High Needs Block allocation in 2023/24 is £111.90m, which is £6.71m higher than received in 2022/23, including the DfE's additional Supplementary Grant funding, which is continued. This represents an increase of 6.4% in cash terms and 6.8% in per pupil terms. These increases are lower than received in recent years. For example, our overall cash increase was 10% in 2022/23 and 14% in 2021/22. This lower increase aligns with our assessment of the Autumn 2021 Spending Review, reinforced by the DfE's recent messaging, that the current 3-year national school funding settlement has been weighted towards 2022/23, with reduced increases to be allocated in 2023/24 and in 2024/25. We anticipate that High Needs Block funding nationally may increase between 3% and 5% in 2024/25.

2.5 The annual growth in High Needs Block funding is allocated across four main pressures, a) growth in the cost of provision (as a result of inflation and increases in salaries costs), b) growth in the number of EHCPs and in the needs of pupils with EHCPs reflected in their placement costs, c) continued expansion of high needs specialist places capacity (special school and resourced provision places), and d) expansion of central support SEND services capacity in response to increased demand. How the High Needs Block within the Dedicated Schools Grant will be allocated across these pressures will be further discussed with the Schools Forum in the autumn and early spring terms. However, beginning at the informal briefing meeting of the Schools Forum that was held on 14 September, the Authority has stated to the Forum that we will need to exercise 'restraint' in 2023/24 in how we uplift top-up funding rates (for pressure a) above), because, as result of the limitations of the High Needs Block settlement that we have received in 2023/24, we must prioritise meeting the substantial additional costs that have come from the significant recent growth, and continuing

growth, in the numbers of EHCPs in Bradford and from the essential continued expansion of high needs specialist places capacity.

2.6 Of the £111.90m of High Needs Block funding that we estimate we will receive in 2023/24, 93% of this is estimated to be delegated or devolved to support the following:

- Children and young people with Education Health and Care Plans (EHCPs) educated in mainstream schools and academies.
- Maintained Special Schools and Special School Academies.
- Enhanced Specialist Provisions (resourced provisions) attached to maintained nursery schools.
- School-led resourced provisions within mainstream primary and secondary schools and academies.
- Local Authority-led resourced provisions within mainstream primary and secondary schools and academies.
- Young people aged 16 to 25 in Further Education Colleges, Sixth Form Colleges and placed with independent or other specialist learning providers.
- Pupil Referral Units (PRUs) and Alternative Provision Academies.
- Children and young people placed in independent provisions and in non-maintained special schools.

2.7 High Needs Block funding is allocated in Bradford also to support Local Authority centrally managed services relating to SEND and to Alternative Provision, as permitted by the Finance Regulations. This includes SEND teaching support services, that are accessed by schools, academies and other settings, and tuition for children and young people that are unable to attend school for medical reasons. Local authorities are permitted to separately fund additional outreach and support services that may be managed centrally or may be devolved to providers under service level agreements.

3. Continuation in 2023/24 of the Existing DfE-Led National High Needs Funding System

3.1 The existing national high needs funding system remains in place and unchanged in 2023/24. Regarding the most prominent elements of this system:

- Place-element funding for specialist provisions (special schools, special school academies, PRUs and alternative provision academies) continues to be set at £10,000.
- Element 2 funding (including the value of place-element funding for places in resourced provisions that are occupied in the October 2022 Census) continues to be set at £6,000.
- Mainstream primary and secondary schools and academies continue to have responsibility for meeting from their delegated budgets the first £6,000 of the cost the additional needs of high needs children.
- Independent and non-maintained special schools continue to remain outside the national Place-Plus system.
- The DfE has confirmed that local authorities continue to be required to allocate the former Teacher Pay and Pensions Grant monies to specialist settings in 2023/24, separately from place-element and top-up funding. Our proposed approach is discussed further in section 9.

4. Place-Element (or Core) Funding

4.1 The national high needs funding approach in 2023/24 continues to be based on the financial definition of a 'High Needs' child or young person being one whose education, incorporating all additional support, costs

more than £10,000 per annum. This threshold lays the foundation of the current national 'Place Plus' framework and is the basis of the definition of the financial responsibility that schools, academies and other settings have for meeting the needs of children and young people from their already delegated formula funding-based budgets.

4.2 High needs funding has two parts a) core (or place-element) funding and b) top-up (or plus) funding. The grid at Appendix 1 sets out in summary how this system operates, and how these two parts work together, for each main type of provider.

4.3 Core (or place-element) funding for Bradford's stand-alone maintained special schools and special school academies, and for PRUs and Alternative Provision (AP) academies, is set at the national annual value of £10,000 for all pre-16 aged placements. The value for post-16 placements in special schools and special school academies is slightly enhanced by the higher value of Element 1 funding in the post-16 national funding formula. Place-element funding is allocated on the agreed number of places commissioned both by Bradford Council and by other local authorities. A Bradford-located institution is allocated place-element funding by Bradford Council for its total number of high needs places, irrespective of where the pupil resides. This place-element funding is allocated to support the institution's core costs (Element 1) and also to contribute to the additional costs associated with meeting the additional needs of the child or young person (Element 2). However, it is not 'pupil specific'. Place-element funding is set before the start of the financial year and isn't withdrawn if an individual place is not occupied. It is up to the institution to decide how best to apportion their total allocated place-element funding across the actual number of places commissioned by the Local Authority. Additional place-element funding, where an institution's number on roll exceeds the number of places during the year, is allocated by Bradford Council. An end of year reconciliation is actioned however, where any additional place-element funding allocated to an institution will be removed if the institution has been allocated too much additional place-element funding when its actual annual composite occupancy is calculated based on the recorded occupancy each month.

4.4 Place-element funding for Bradford's School-led resourced provisions, Early Years Enhanced Provisions (EYESPs), and for post-16 placements in Further Education Colleges, operates on the basis set out in paragraph 4.3, but is set at the national annual value of £6,000. The value is not £10,000 because these institutions, unlike special schools and PRUs, already receive formula funding, which allocates the first part of place-element funding (known as Element 1). To explain then, how place-element funding is split into 2 parts in the national system:

- Element 1: a basic £4,000 for children and young people aged pre-16, which is the notionally defined value of funding that all pupils attract and which has already been allocated to cover an institution's core costs, either by the Local Authority's pre-16 funding formula or by the Authority's Early Years Single Funding Formula (EYSFF). These formula allocations are derived from either the annual October Census (pre-16 formula) or from 3 termly censuses (EYSFF). For post-16 students, this Element 1 is derived from the national post-16 funding formula and typically is more than £4,000 (notionally defined at £5,600 for the 2022/23 academic year). Element 1 across the post-16 sector is funded with a year's lag in pupil numbers. The total allocation of Element 1 for the 2023/24 academic year will be based on the number of students recruited in 2022/23.
- Element 2: a further £6,000 for additional needs, which is not already allocated:
 1. Within the formula funding received by Bradford's mainstream schools and academies that have School-led resourced provisions where the Local Authority commissions high needs places.
 2. Within the formula funding received by Bradford's maintained nursery schools that have resourced provisions where the Local Authority commissions high needs places. £6,000 is the value for 1 FTE place. Therefore, a 15-hour place = 0.6 FTE (£3,600) and a 30-hour place = 1.2 FTE (£7,200).
 3. Within the formula funding received by Bradford's Further Education Colleges where the Local Authority commissions high needs places post-16.

4.5 The national funding system includes an additional complexity in the calculation of place-element funding for School-led resourced provisions in mainstream primary and secondary schools and academies. As explained above, the value of a place is set at £6,000, where that place was occupied at the time the October

Census in the previous year was taken. Where a place is not occupied at this census however, local authorities are required to fund this place at £10,000 in the following year. This is because the school or academy will not receive Element 1 funding specifically for this place in the following financial year via its normal delegated formula funding. Following a similar principle, for maintained nursery schools, an adjustment is made to the funding allocated via the EYSFF to add Element 1 funding for the resourced places that are not occupied in the 3 termly censuses.

4.6 Place-element funding for Bradford's Local Authority-led resourced provisions operates on the same basic principles as for School-led provisions, but with a couple of technical differences relating to the fact that the Local Authority retains Element 2 funding, whereas, for School-led provisions, Element 2 funding is retained by the school or academy. These technical differences are highlighted in Appendix 1.

4.7 The physical payment by Bradford Council of place-element funding, where this is delegated and where it is the Council's responsibility to pay it (rather than the Education Skills and Funding Agency's responsibility), takes place on a monthly basis and is combined with the monthly payment of top-up funding, which is described further in sections 6, 7 and 8. Bradford Council publishes monthly funding and payment statements for settings to access on [Bradford Schools Online](#). For some institutions, such as for academies and for Further Education Colleges, place-element funding is not directly paid by Bradford Council. Instead, the Education Skills and Funding Agency (ESFA) deducts place-element funding from the Council's Dedicated Schools Grant to pay this across to these settings directly.

4.8 Apart from resourced provisions established by the Local Authority, mainstream primary and secondary schools and academies do not receive additional place-element funding for children and young people on roll that have Education Health and Care Plans (EHCPs). The national high needs funding system works on the basis that mainstream primary and secondary schools and academies have sufficient funding already within their delegated formula funding allocations to enable them to meet the additional costs of the SEND needs of their pupils, up to the threshold of £6,000. Local authorities are required to define for each primary and secondary school and academy the value of their formula funding that is 'notionally' allocated for SEND, which is to be used to meet the first £6,000 of needs of pupils with EHCPs, as well as the needs of pupils without EHCPs. The value of each maintained school's notional SEND budget is set out in the annual S251 budget statements that are published by Bradford Council. A separate statement, showing the notional SEND allocations for all maintained primary and secondary schools, as well as for all academies, is published annually on Bradford Schools Online. Please see Appendix 3 for more technical information regarding our current 2022/23 definition of notional SEND. Further discussion on notional SEND for 2023/24 is presented in section 10.

4.9 In 2021/22, we amended our separate additional 'SEND Funding Floor' mechanism, which applies to mainstream primary and secondary schools and academies, initially for year in trial pending review. We continued this new Floor mechanism in 2022/23. How the Floor has operated in 2022/23 is explained in more detail in Appendix 3. The SEND Funding Floor is re-calculated on a monthly basis for changes in the numbers of Education Health and Care Plans (EHCPs) on roll. The SEND Funding Floor is currently aimed at ensuring that no mainstream primary or secondary school or academy will have to manage, from their own mainstream delegated formula funding, an above phase-average cost pressure in respect of their commitment to meet the cost of Element 2 £6,000 for their EHCPs. As well as supporting provision for pupils with EHCPs, a purpose of the Floor is to help protect the funding used by schools and academies to support their wider Additional Educational Needs, SEND and Alternative Provision activities. Further discussion on SEND Floor for 2023/24 is presented in section 11.

4.10 For providers delivering the entitlements to early education to 2, 3 and 4 year olds (maintained nursery schools, nursery classes in primary schools and academies, and Private, Voluntary and Independent providers), Bradford Council allocates Element 1 funding using our Early Years Single Funding Formula (EYSFF), which is funded by our Early Years Block within the Dedicated Schools Grant. Element 2 however, is not allocated within the EYSFF. As a consequence, all early years children that have EHCPs, that are not placed in the EYSPs within maintained nursery schools, are allocated Element 2 funding in addition to the top-up funding provided by the EHCP Banded Model. Bradford Council also has in place an Early Years SEND Inclusion Fund (EYIF), funded by the Early Years Block, which enables Element 2 funding to be allocated to support children in early years settings who have low level emerging SEND and who do not have EHCPs. In addition to EYIF, all early years providers of the 3 and 4 year old entitlement are entitled to receive a one off payment for children eligible for the Disability Access Fund (DAF). Further details on the SEND

Inclusion Fund (EYIF) and on the Disability Access Fund (DAF) can be found in our Early Years Technical Statement [here](#).

4.11 Place-element funding for education in hospital provision, nationally, has still to be brought into the Place-Plus methodology. Currently, local authorities are required to maintain prior-year place funding values. Bradford's hospital provisions closed as separate PRUs on 31 August 2019 and Tracks closed as a separate entity on 31 August 2020. Provision is continuing as a single Local-Authority service. Funding of this centrally managed service now operates outside the Place-Plus mechanism, working within the discrete allocation provided by the DfE within our High Needs Block.

4.12 The funding of independent schools has not yet been brought into the national Place-Plus funding system. The basis of funding of placements in these settings therefore, is not 'formularised'. Placement costs will be influenced by a number of factors, including the needs of the child and the availability of places.

5. Commissioned High Needs Places in Bradford-located Settings

5.1 It is helpful to provide sight of the number of high needs places that are currently being commissioned in specialist settings by Bradford Council and that are planned to be commissioned in 2023/24. It is also helpful to show the distribution of these places across different types of settings. A draft schedule of places is presented in Appendix 4.

5.2 Whilst understanding that places commissioning work is still taking place, and that the numbers presented in Appendix 4 for 2023/24 are subject to change, the draft place numbers currently do include / take account of:

- The continuation and full year impact of places that have been recently created and that are planned to be created during 2023/24, including where new places are not yet assigned to individual settings.
- Additional adjustments to individual settings for changes in places capacity that are already confirmed.
- The numbers of post-16 places brought forward from the 2022/23 academic year that will be the starting point for commissioning from the Further Education Colleges for the 2023/24 academic year. The 2023/24 numbers are currently still being discussed and finalised with the Colleges themselves.
- The consolidation and expansion of provision for pupils permanently excluded in alternative provisions.
- The amalgamation of the hospital education and Tracks services within a single Local-Authority managed service, meaning that the places presented in Appendix 4 are now 'notional'.

6. Top-Up Funding for EHCPs 2023/24: Pupil-Led Need

6.1 Top-up funding (also known as Element 3 or 'Plus' funding) is the funding required by an institution, over and above place-element funding, to enable a child or young person with high needs to participate in education and learning. Top-up funding is expected to reflect the cost of additional support an institution incurs related to the individual needs of the child or young person. In this document this is called 'Pupil-Led Need' and this is discussed further in this section. Top-up funding can also reflect costs (and differences in costs) related to the setting that the child or young person is placed at. In this document this is called 'Setting-Led Need' and this is discussed further in section 7. How top-up funding is allocated to PRUs and to Alternative Provision Academies, for provision for pupils permanently excluded rather than specifically for children and young people with EHCPs, is discussed in section 8.

6.2 Across all local authorities, most children and young people receiving high needs top-up funding will have an Education Health and Care Plan (EHCP), resulting from the statutory assessment process. Local authorities do have the flexibility to allocate high needs funding outside the statutory assessment process for children and young people up to the age of 19. An example of this might be where a local authority provides funding from their High Needs Block to support schools, or clusters of schools, to commission alternative provision for pupils that remain on the schools' rolls. With Bradford's Schools Forum, Bradford Council has previously agreed for the High Needs Block in Bradford to 'step back' from supporting the cost of placements

for children and young people that are placed by schools (rather than by the Local Authority) in alternative provisions. In these instances, the schools commissioning the alternative provision places (including through the Behaviour Attendance Collaborative in the secondary phase) are expected to meet the placement costs fully using their delegated formula funding allocations. This position is retained for the 2023/24 financial year. How this position may develop for future years, as a result of the changes to the approach to alternative provision funding that are proposed in the DfE's national SEND and AP Review, will be considered more closely as further details are published.

6.3 Top-up funding for children and young people with EHCPs is paid by the placing local authority. Bradford Council is responsible for paying the top-up for children and young people with EHCPs that are resident in Bradford and that we place either in Bradford-located settings or elsewhere. Institutions in Bradford should recover directly the top-up funding for their pupils with EHCPs that are placed with them by other local authorities.

6.4 As stated in section 1, we introduced at April 2020 a new Banded Model for the allocation of our top-up funding for EHCPs. This model replaced our previous 'Ranges Model' and significantly uplifted the funding of EHCPs across all settings. The Model continues to include protections, which have ensured (and which will continue to ensure) that no EHCP in place on 1 April 2020 will reduce in value as a result of this funding model change.

6.5 We do not propose to make any technical changes to our EHCP Banded Model for the 2023/24 financial year. We propose simply to continue to allocate top-up funding using this existing EHCP Banded Model, uplifting the values that this model allocates. How the Banded Model works, how it is applied currently, and how it is proposed to work and be applied in 2023/24, are set out in more detailed in Appendix 2.

6.6 The total value of top-up funding owed to an institution by Bradford Council, calculated using the EHCP Banded Model, will continue in 2023/24 to be calculated and paid as now, on a monthly basis. The calculation will be based on the institution's occupancy recorded on the 10th day of each month. Where a child or young person is admitted after the 10th, top-up funding begins from the next month. In addition:

- Retrospective adjustments will be made in the subsequent month's calculations for any inaccuracies in the data for a single month, or where the position has been estimated due to the most up to date data not being available (for example, at September, picking up all changes for the new academic year). How the Local Authority publishes EHCP information and then manages data checking, queries and inaccuracies that might be identified is explained [here](#).
- Funding for August will repeat the position recorded for July, except for Further Education placements, where August's funding is based on the new academic year's position.
- A ready reckoner will continue to be available, which will help settings predict the impact on top-up funding of movements in pupil numbers / bands on a monthly basis.
- Bradford Council will also continue to publish on Bradford Schools Online monthly funding and payment statements for providers to access. These statements are published [here](#).

6.7 The process for placing children and young people with EHCPs into the Banded Model will continue to be led by Bradford Council via the established SEND Panel and using the application and assessment processes this Panel manages. Appeals (or disputes) will be managed by the Panel through its resolution procedure. Information, guidance and documentation on EHCP Panel processes and on SEND assessment is available on Bradford Schools Online [here](#).

6.8 The table below shows the actual top-up rates that were funded in 2019/20 (under our previous Ranges Model), in 2020/21 (in the first year of our new Banded Model), in 2021/22, and that are funded now in the current 2022/23 financial year. The table also then shows, in the right-hand column, the rates that are proposed for 2023/24, subject to warning that is given in paragraph 1.6 about final affordability check. These rates would be used from 1 April 2023, subject to the outcomes of this consultation and this final affordability check.

	£ Top-up Value 2019/20	£ Top-up Value 2020/21	£ Top-up Value 2021/22	£ Top-up Value 2022/23	£ Top-up Value 2023/24
Band 3L	£952	£1,670	£1,900	£2,236	£2,318
Band 3M	£3,000	£3,347	£3,626	£4,036	£4,136
Band 3H	£4,597	£4,974	£5,302	£5,783	£5,900
Band 4L	£7,160	£7,747	£8,435	£9,218	£9,411
Band 4M	£10,440	£11,296	£12,235	£13,270	£13,524
Band 4H	£13,910	£15,051	£16,148	£17,377	£17,678
Protected 7	£22,857	£24,732	£26,534	£28,553	£29,048

6.9 The table below shows the % uplifts in values between 2020/21 and 2023/24 and, in the right-hand column, the cash uplifts between 2023/24 and 2022/23, as proposed.

	% Increase Top-up 2020/21 vs. 2019/20	% Increase Top-up 2021/22 vs. 2020/21	% Increase Top-up 2022/23 vs. 2021/22	% Increase Top-up 2023/24 vs. 2022/23	£ Increase Top-up 2023/24 vs. 2022/23
Band 3L	+ 75.4%	+ 13.8%	+ 17.7%	+ 3.7%	+ £82
Band 3M	+ 11.6%	+ 8.4%	+ 11.3%	+ 2.5%	+ £100
Band 3H	+ 8.2%	+ 6.6%	+ 9.1%	+ 2.0%	+ £118
Band 4L	+ 8.2%	+ 8.9%	+ 9.3%	+ 2.1%	+ £192
Band 4M	+ 8.2%	+ 8.3%	+ 8.5%	+ 1.9%	+ £254
Band 4H	+ 8.2%	+ 7.3%	+ 7.6%	+ 1.7%	+ £301
Protected 7	+ 8.2%	+ 7.3%	+ 7.6%	+ 1.7%	+ £495

6.10 The table below shows the proposed % uplifts in 2023/24 values on 2022/23 values when Element 2 (£6,000) and Element 1 (£10,000) are included.

	(1) % Increase in Top-up Only	(2) % Increase in Top-up plus £6,000	(3) % Increase in Top-up plus £10,000
Band 3L	+ 3.7%	+ 1.0%	+ 0.7%
Band 3M	+ 2.5%	+ 1.0%	+ 0.7%
Band 3H	+ 2.0%	+ 1.0%	+ 0.7%
Band 4L	+ 2.1%	+ 1.3%	+ 1.0%
Band 4M	+ 1.9%	+ 1.3%	+ 1.1%
Band 4H	+ 1.7%	+ 1.3%	+ 1.1%
Protected 7	+ 1.7%	+ 1.4%	+ 1.3%

6.11 To explain what these tables present:

- The total value of funding that is allocated to support an individual EHCP is derived by adding Element 2 (at a fixed value of £6,000 per 1 FTE pupil) to the value of the top-up that is allocated through the Banded Model.
- The total value of support for each of the three steps in Band 3 (Band 3L, 3M and 3H), when Element 2 £6,000 is added to the top-up value, is proposed to be uplifted by 1.0%. This 1.0% uplift is demonstrated in column (2) in the table in paragraph 6.10.
- The total value of support for the three steps in Band 4 (Band 4L, 4M and 4H), when Element 2 £6,000 is added to the top-up value, is proposed to be uplifted between 1.3% (Band 4L) and 1.4% (Band 4H). These uplifts are demonstrated in column (2) in the table in paragraph 6.10. The uplift of Band 4 values is guided by two additional considerations:

Firstly, the desire to follow as closely as possible the existing ratio between the top-up value allocated by Band 3H versus the value allocated by Band 4L, so that the transition between Band 3 and Band 4, as currently applied following the guiding calculations that our model was originally established on, is retained.

Secondly, that it is important to set the uplifts to Band 4 top-up values with reference to the full £10,000 place-element value, not just to the Element 2 £6,000 value. This is so that we consider the total funding available per occupied place in specialist settings. The vast majority of children and young people with EHCPs assessed at Band 4 are placed in special schools, in special school academies and in resourced provisions. These settings receive £10,000 per occupied place. We propose to uplift the top-up value at the bottom of Band 4, at Band 4L, so that, when this top-up is added to the £10,000 place-element figure, the total value of funding allocated per occupied place increases by 1.0% on 2022/23. This ensures that the total value of funding that is allocated per occupied place at Band 4L increases in line with the 1.0% of the Band 3 Model. The 1.0% uplift per occupied place at Band 4L is demonstrated in column (3) in the table in paragraph 6.10. The calculations within the model, that form the basis of the Band 4 values, then adjust from the Band 4L reference point to provide slightly higher increases at Band 4M and Band 4H.

- Although the values of uplifts proposed for 2023/24 are different from those that were applied for 2022/23, we have approached the process of uplifting these values in the same way. One of the key features of this approach is adjusting for the lack of movement in the value of Element 2, which remains at £6,000, and the value of the place-element for specialist settings, which remains at £10,000. As a consequence of this lack of movement, the values of the top-ups allocated through the Banded Model must increase by greater percentages in order to achieve the total overall increases in available funding that we propose.

This is the reason why the % increases in top-up, as shown in the table in paragraph 6.10 column (1), are higher. This is also a primary reason why the % increases in top-up in the different steps in the model are not the same; the Element 2 value of £6,000 as a proportion of the total cost of provision decreases as the steps get higher. Therefore, the extent to which the top-up has to compensate for Element 2 not increasing in value also decreases as the steps get higher. Recognising this feature, it would not be appropriate for us simply to provide a blanket % increase in top-up funding across all steps. Column (2) in the table in paragraph 6.10 gives the true real position of the increase in total funding available at each step – Element 2 plus top-up - to support the cost of EHCP provision. Column (3) shows the true real position of the increase in total funding per occupied place in specialist settings.

- The Banded Model retains a transitional 'Protected 7' step, which will continue to fund EHCPs that were graded at Range 7 under the old model in place on 1 April 2020. We have guaranteed that the value of Protected 7 will be uplifted each year by the same % that is applied to Band 4H. The tables above evidence this.

6.12 As we stated in section 2, the annual growth in High Needs Block funding that the Authority has received from the DfE in 2023/24 is reduced on recent years - an estimated increase of £6.71m, which is an increase of 6.4% in cash terms. Our current 2023/24 modelling indicates quite clearly that our growth in high needs spending in 2023/24 will substantially exceed our growth in funding. Therefore, within our 2023/24 budget, we must prioritise meeting the substantial additional costs that have come from the recent growth, and continuing growth, in the numbers of EHCPs in Bradford and from the essential continued expansion of high needs specialist places capacity. As a consequence, we need to exercise 'restraint' in how we uplift top-up funding rates, and a proposed 1% increase in 2023/24 is reflective of this. We wish to emphasise, as shown in the table in paragraph 6.9, that top-up funding rates have been substantially increased by Bradford Council since April 2020. We would ask that settings view the 1% increase in this wider context. 1% is on par with the maximum increase in early years entitlement funding rates that we anticipate we will be able to afford as a result of the DfE's Early Years Block settlement in 2023/24. 1% is also higher than the 0.5% increases in the Minimum Levels of Funding (MFLs) and the Minimum Funding Guarantee (MFG) that the DfE is providing within the Schools Block (mainstream primary and secondary school and academy) National Funding Formula.

6.13 The Finance Regulations provide for a specific Minimum Funding Guarantee (MFG) for special schools and special school academies, which is normally invoked when an authority substantially amends its approach to top-up funding, to the extent that this would reduce the budget of (or reduce any increase that would have otherwise been allocated to) a special school or to a special school academy. The DfE in 2023/24 however, has amended the MFG mechanism to ensure that local authorities have passed through to special schools a minimum proportion of the additional High Needs Block funding that authorities have received, especially in 2022/23 (via additional supplementary grant funding). The 2023/24 Regulations require an MFG of positive 3.0%, when 2023/24 funding is compared with that received in 2021/22. This MFG means that funding per place for each special school and special school academy in 2023/24, incorporating both place-element and top-up funding (but excluding the separate former Teacher Pay and Pensions Grant funding),

must be at least 3.0% higher than received in 2021/22, when calculating funding in both years on a 'like for like' basis (same place numbers, same school circumstances and same top-up determinations). We uplifted special school funding (Band 4 top-up funding plus the £10,000 place-element) by a minimum 4.25% per place in 2022/23, and we propose to increase the funding of all EHCP bands further in 2023/24 by a minimum 1%, without amending how our Banded Model works. As a result, we will quite clearly exceed the requirements of the 3.0% MFG.

6.14 We have explained in this section how we propose to approach uplifting the EHCP Banded Model in 2023/24. More details of the Model itself are presented in Appendix 2. As final point, our approach to uplifting values in 2023/24 does not intrinsically adjust the quantity of support that is funded by each step. We have deliberately not sought to alter this, as we wish the Model to continue to work alongside our published SEND provision matrices and SEND Panel guidance. The Banded Model itself essentially simply provides a 'toolbox' for the SEND Panel to use to find the best funding fit for meeting the needs of children and young people with EHCPs. We will keep this Model under review and we may look to adjust the provision mapping assumptions on which it is based. The DfE's national SEND Review may also (is very likely to) have implications for the workings of our Banded Model at a point in the future - the DfE has stated within its SEND Review documentation, in order to improvement consistency, that work will be done to develop a national banding framework for defining top-up funding. The timescales for this however, are currently unclear.

Question 1 – Do you agree with the approach that is proposed for uplifting the values of the EHCP Banded Model in 2023/24? If not, please can you explain why not.

Question 2 – Do you have any comments (including technical comments) on the EHCP Banded Model you would like the Authority to consider for 2023/24?

7. Top-Up Funding for EHCPs 2023/24: Setting-Led Need in Specialist Settings

7.1 Top-up funding can be allocated also to reflect costs (and differences in costs) related to the specialist setting that a high needs child or young person with an EHCP is placed at. In this document this is called 'Setting-Led Need'.

7.2 Place-element funding is expected to meet a specialist setting's basic core costs. However, our current high needs funding model for specialist settings recognises that there are certain differences in a setting's cost base that are influenced by the features of the setting. Two simple examples are that the setting is small, and requires additional funding to meet core costs of a fixed nature, and that the setting operates across a split-site and therefore, has certain duplicated and additional costs.

7.3 Appendix 3 sets out in more technical detail the setting-led need factors that are included within Bradford Council's proposed funding approach for 2023/24, and how and where they are applied.

7.4 These factors, in summary, are:

- Maintained special schools and special school academies: split sites; post-16 Element 1 enhancement; new services delegation; small setting protection; 3% cash budget protection.
- School-Led Resourced Provisions attached to mainstream primary and secondary schools and academies: small setting protection; 3% cash budget protection.
- Early Years Enhanced Specialist Provisions attached to maintained nursery schools: small setting protection.

7.5 For 2023/24, we do not propose to make changes to these factors, with the exception of a change to the value of the Post-16 Element 1 Enhancement factor for special schools and special school academies. As the notional Element 1 value in the national Post-16 funding formula has increased from £5,200 to £5,600 for the 2022/23 academic year, we propose to adjust the value of the Enhancement factor from £1,200 to £1,600. All other setting-led need factors are proposed to be calculated in 2023/24 using the same formulae and same factor values as used in 2022/23. Please note that we are not proposing to uplift the values of these factors in 2023/24.

7.6 Setting-Led Need top-up is calculated and re-calculated alongside Pupil-Led Need top-up on a monthly basis following the same timetable set out in paragraph 6.6.

Question 3 – Do you agree with the approach to setting-led need factors in 2023/24 that is proposed? If not, please can you explain why not.

Question 4 – Do you have any comments (including technical comments) on the setting-led need factors you would like the Authority to consider for 2023/24?

8. PRUs and Alternative Provision Academies 2023/24 – Day Rate Top-up Funding Model

8.1 This section sets out the proposed approach to the continuation of the Authority’s calculation of top-up funding to support the cost of provision for pupils permanently excluded and placed by the Authority in Park Aspire and in Bradford Alternative Provision Academy Central (BAPA). The methodology and principles set out here also extend to the Authority’s funding of top-up for pupils permanently excluded that may be placed in other provisions, where such extension is appropriate.

8.2 Park Aspire and BAPA both receive place-element funding from the High Needs Block, at £10,000 a place, as explained in section 4. These settings then also then receive top-up funding from the Authority for places that are occupied, following the placement of pupils permanently excluded. We introduced at April 2020 a Day Rate Model for the calculation of this top-up. A formulaic basis, such as this, follows the DfE’s current expectation that, as top-up funding for alternative provision institutions is not usually related to an assessment of SEND, a standard predictable top-up rate can be set, which reflects the overall budget needed by the institution. This budget should be built up with the understanding that a level of capacity is needed to be retained during the year, recognising that numbers on roll in PRUs and in alternative provision academies can fluctuate.

8.3 Using our Day Rate Model, top-up funding is allocated on an agreed £value per day, multiplied by the number of days of provision expected to be delivered weekly / monthly / termly / annually. The total number of annual days is 195. The value of the day rate adjusts according to the PRU’s / AP academy’s overall occupancy to ensure that a minimum level of funding is allocated to enable the PRU / AP academy to meet fixed costs (largely related to the setting) and to retain sufficient staffing capacity for the Authority to use. The model is informed by annual review, which includes checking actual against expected occupancy. In situations where there are significant differences in occupancy, which are more permanent, the number of places to be commissioned by the Authority will be reviewed for the following year.

8.4 We propose to uplift the value of the day rate in 2023/24 in line with the uplifts that are proposed to the Band 4 values allocated by the EHCP Banded Model. The day rate in 2022/23 was £77.78. We propose to uplift this, subject to the warnings given in paragraph 1.6, to £79.13. This is the 2022/23 rate plus 1.73%, which uses the mean average Band 4 increase proposed for the EHCP Banded Model of 1.87%, but reduced to recognise that the small setting protection factor within the calculation is not uplifted. The calculation of the day rate is set out further in the table below. Together with the fixed £10,000 per place, a 1.73% increase in the day rate results in an overall 1.04% increase in funding per pupil for each occupied place (the total annual per pupil funding in 2023/24 will be £10,000 + (195 days x £79.13) = £25,430 compared with £10,000 + (195 days x £77.78) = £25,168 in 2022/23).

8.5 The £79.13 is made up of the following factors and values. These factors are the same as used in 2022/23. All factors but the small setting protection have been uplifted by 1.87%. The small setting protection factor is retained at the 2022/23 value, as is the case for all other parts of high needs formula funding that include a small setting protection factor, because this factor protects place-element funding and place-element funding is not uplifted in value in 2023/24.

Factor	£Day Rate Value
Main pupil-need led provision	£66.04
Small Setting Protection	£5.55
Business Rates	£1.98
New Services Delegation	£2.41
Pupil Mobility	£3.16
Total	£79.13

8.6 The equivalent annual per pupil value, based on 195 days, is as follows:

Factor	£Day Rate Value
Main pupil-need led provision *	£12,876
Small Setting Protection	£1,082
Business Rates	£387
New Services Delegation	£470
Pupil Mobility	£615
Total	£15,430

* this element is the equivalent of the top-up funding allocated to EHCPs through the Banded Model. This value sits between bands 4L and 4M.

8.7 We propose to continue to apply the Day Rate Model, as we applied it in 2022/23, with the calculation of a minimum top-up funding value based on each setting's agreed commissioned places number. In this way, the funding model continues to support both Park Aspire and BAPA to retain their unique capacities to deliver the number of places the Authority plans to commission.

- Where Park Aspire and BAPA are close to full occupancy throughout the year, they will be funded at £79.13 per day per pupil / £15,430 per year per pupil.
- The basic day rate value of £79.13 will be adjusted however, where necessary should occupancy fluctuate, to ensure a minimum level of funding to enable capacity retention, meaning that Park Aspire and BAPA will not receive an annual cash total value of top-up funding lower than:
 - $(£1,082 + £387 + £470 + £615) \times \text{no. of places (for setting-based costs), plus}$
 - $88\% \text{ of } £12,876 \times \text{no. of places (for main pupil-led need provision)}$

8.8 We will continue the following two technical features, which relate to the application 'in year' of the Day Rate Model in 2023/24:

- We will continue to use the 10th of the month census to count (and re-count) occupancy, which is the process followed for the re-calculation of Banded Model funding for EHCPs. We will continue to re-calculate the funding of Park Aspire and BAPA on a monthly basis as now, taking the 10th of the month census as the actual occupancy for that month. We will keep this approach under review for future years. The DfE has signalled, in the national SEND and Alternative Provision Review, that there will be a move towards 'fixed' budgets for PRUs and alternative provision academies, where funding allocations will not be affected by 'in year' occupancy. Whilst we await further details, and the timing of any directed changes, we propose to continue our current arrangements. We would emphasise that we already employ a factor, as explained above, which does guarantee settings a minimum level of top-up funding, based on the number of commissioned places, without reference to actual occupancy during the year.
- We will continue to calculate and profile top-up funding across 12 months. In previous consultations, we have indicated that we could be more specific about the number of days delivered and funded each month, taking account of the profile of holidays. We indicated that this would be a more significant matter to consider if the numbers on roll in the PRU / AP academy are significantly different at different times of the year. Again, in the context of the national SEND and Alternative Provision review, it does not make sense for us now pursue review work, which would take our approach to funding further away from the 'fixed' budget approach that the DfE has proposed for the future.

Question 5 – Do you agree with the Day Rate mechanism that the Authority proposes to use to fund the PRU and Alternative Provision Academy in 2023/24? If not, please can you explain why not.

Question 6 – Do you have any comments (including technical comments) on the proposed Day-Rate mechanism you would like the Authority to consider for 2023/24?

9. Continued Replication of the Former Teacher Pay and Teacher Pensions Grants 2023/24

9.1 We have been required to add into our formula funding arrangements for specialist settings the allocation of the former Teacher Pay Grant (TPG) and the Teacher Pension Grant (TPECG). This change was required at April 2021, in response to these grants, allocated in respect of special schools, special school academies, PRUs, alternative provision academies and mainstream primary and secondary pre-16 provisions, being transferred into the Dedicated Schools Grant (DSG).

9.2 We allocated these former TPG and TPECG monies in 2022/23, separately from both place-element and top-up funding, as follows:

- To maintained special schools and special school academies, Park Aspire and BAPA: a minimum fixed value of £733 per place, with place numbers fixed at the original agreed commissioned number for the 2022/23 financial year. These commissioned numbers included the planned expansion of provisions. Where a setting, prior April 2021, received an amount per place that was higher than the minimum value, and where their amount per place, uplifted by 5% in 2021/22 and by 5.8% in 2022/23, was still higher than the minimum £733 for 2022/23, the setting has been allocated their uplifted pre-April 2021 amount per place. This 'protection' was applied to 4 of 10 settings. Payment has been split so that 5/12ths of the annual value was paid in a lump sum in April 2022 and 7/12ths was paid in a lump sum in September 2022.
- To school-led resourced provisions and Early Years Enhanced Specialist Provisions: based on place numbers fixed at the original agreed commissioned number for the 2022/23 financial year, a fixed value of £733 per place, where a place was not occupied in the October 2021 Census, and either a value of £548 (primary) or £460 (secondary) where a place was occupied in the October 2021 Census. The values of £548 (primary) and £460 (secondary) were derived from the differences between the £733 and the value of TPG and TPECG monies that been transferred to be allocated already through the mainstream primary and secondary funding formula. All places in the EYESPs were recorded as unoccupied for the purposes of this calculation. Commissioned places numbers for all resourced provisions included planned expansion during 2022/23. Payment has been split so that 5/12ths of the annual value was paid in a lump sum in April 2022 and 7/12ths was paid in a lump sum in September 2022.

9.3 We propose to continue to allocate these former grant monies in 2023/24 following the same approach as we used in 2022/23, and using the same values, as follows:

- Funding will be calculated and fixed on the original agreed commissioned places number for each setting for the 2023/24 financial year, with these numbers incorporating the planned expansion of provisions. This funding will not be adjusted for over or under occupancy during the year.
- The basic rate of funding per place for 2023/24 is proposed to be retained at £733.
- The protection of pre-April 2021 per place funding values for individual special schools, special school academies and PRUs / Alternative Provision academies, will continue to be applied, as this was in 2022/23. We expect this to continue for 4 out of 10 settings, where these settings will be allocated the greater of £733 or their 2022/23 protected per place value.
- School-led resourced provisions will continue to be allocated a fixed value of £733 per place, where a place was not occupied in the October 2022 Census, and either a value of £548 (primary) or £460 (secondary) where a place was occupied in the October 2022 Census.
- All places in the EYESPs will continue to be recorded as unoccupied for the purposes of the resourced provision calculation.
- Payment will be split so that 5/12ths of the annual value will paid in a lump sum in April 2023 and 7/12ths will be paid in a lump sum in September 2023.

Question 7 – Do you agree with the methodology that the Authority proposes to use to allocate the Teacher Pay Grant and Teacher Pensions Grant in 2023/24? If not, please can you explain why not.

10. Notional SEND Budget Definition for Mainstream Primary & Secondary 2023/24

10.1 We propose to amend in 2023/24 our definition of Notional SEND budgets within mainstream primary and secondary school and academy formula funding allocations.

10.2 Local authorities are required to define for each primary and secondary school and academy the value of its mainstream formula funding that is 'notionally' allocated for Special Educational Needs and Disabilities (SEND) - for meeting the first £6,000 of the cost of the additional needs both of pupils with EHCPs and also of pupils without EHCPs. This not additional funding, but a definition of how much funding, that is already allocated, is available to support SEND. How Bradford currently (in 2022/23) defines notional SEND (the %s of funding within each formula factor that make up this budget) is shown in the table below. We have also explained our current Notional SEND budget approach in Appendix 3. The Section 251 Budget Statements for maintained schools, and the General Annual Grant (GAG) Statements for academies, show the calculation of Notional SEND budgets for individual schools / academies. We also publish on Bradford Schools Online, annually in February, the calculation of Notional SEND budgets for all primary and secondary schools and academies in Bradford for the following financial year.

10.3 Our current definition has built up over time, but, in particular, is based on how we began to delegate EHCP (then known as SEND Statements) funding to schools around 15 years or so ago, before the advent of the current national place-plus high needs funding methodology and the £6,000 element 2. We have identified that we should look again at our definition, but, as we've explained in consultations in recent years, we have not progressed a local review because we expected that the DfE's national SEND Review, as well as the movement to the hard National Funding Formula for primary and secondary schools and academies, would determine how Notional SEND would work in the very near future. The DfE did also previously suggest that the concept of a Notional SEND budget could be replaced with something else.

10.4 The DfE however, has now confirmed that Notional SEND budgets will continue to be defined going forward and that, at the point the hard National Funding Formula is introduced for mainstream primary and secondary school and academy formula funding (by 2027/28 at the latest), there will be a national consistent definition.

10.5 Highlighting that there is currently quite a bit of difference in how local authorities define Notional SEND budgets for schools and academies in their areas, and seeking to encourage movement towards greater consistency prior to the establishment of the hard National Funding Formula, the DfE has recently published new operational guidance for local authorities. Whilst this guidance does not prescribe how authorities should now define Notional SEND, it does strongly encourage all local authorities to review their approaches, and sets out broad expectations.

10.6 We have reviewed our approach, especially by comparing our definition to national, regional and other useful averages (including similar High Needs Block funded authorities and Metropolitan District Authorities). Our rationale for approaching our review this way is that, as was the case with the initial construction of the National Funding Formula (NFF) within the Schools Block, and as is now behind the DfE's methodology for the review of this NFF, we anticipate that a national consistent definition of Notional SEND will be strongly informed by averages (by the common national picture). Where we are different, we wish to begin to make changes, to bring our approach closer in line with averages, incrementally, rather than having a significant single change at the point the 'hard' NFF is finally established. It may also be the case that the DfE does further prescribe approaches for Notional SEND prior to 2027/28, and we wish to be well placed to absorb this.

10.7 In our review, we have not intrinsically set out with the aim of significantly altering the values of Notional SEND budgets that are retained by schools and academies, either overall or by the majority of individual settings. By this, we mean that, if we compare what Notional SEND budgets would be in 2023/24 using our current approach, against a new approach, there aren't significant differences overall or within the majority of schools / academies (when we look at Notional SEND as a % of funding or on a per pupil basis). One of the changes that we propose however, does specifically increase the Notional SEND budgets for schools and academies that receive funding via the Minimum Levels of Funding (MFLs) factor. However, we feel that there is a clear rationale for this, which is explained below.

10.8 Irrespective of whether we use the existing or the new method, the overall total value of Notional SEND budgets is expected to increase in 2023/24, due to pupil numbers and other changes (including the merger of

the Schools Supplementary Grant into primary and secondary core formula funding), as well as due to the 2023/24 funding settlement. Individual schools and academies however, will see differences (both up and down) due to pupil numbers and pupil circumstances changes (differences between the October 2022 and the October 2021 Censuses), again, irrespective of whether we use the current or the new method.

10.9 Following our review, we propose to make two changes to our definition of Notional SEND budgets in 2023/24. Firstly, we propose to bring our definition of Notional SEND more in line with national averages, by adjusting the percentages of the different factors that make up the Notional SEND budget, as follows:

Current

Formula Factor	% Primary	% Secondary
Prior Low Attainment Factor	100%	100%
Free School Meals Factor	23.1%	10.2%
Income Deprivation Affecting Children Index (IDACI) Factor	22.4%	19.2%
Base £APP funding (AWPU)	7.5%	6.3%

Adjusted to

Formula Factor	% Primary	% Secondary
Prior Low Attainment Factor	100%	100%
Free School Meals Factor	25.0%	25.0%
Income Deprivation Affecting Children Index (IDACI) Factor	25.0%	25.0%
Base £APP funding (AWPU)	6.5%	4.0%

10.10 Secondly, we propose to bring into the definition of Notional SEND a proportion of the additional funding that schools and academies receive via the Minimum Levels of per Pupil Funding (MFL) factor. We propose, for both primary and secondary phases, to bring 48% of MFL funding into the Notional SEND Budget. The rationale for this is to improve the fairness and equity of our definition. A principal reason why per pupil funding levels vary between schools / academies is differences in the levels of additional needs of pupils, as measured by Free School Meals, IDACI, Low Prior Attainment etc. The MFL factor brings the per pupil funding for all schools and academies up to a defined minimum. It is the case that two primary schools, for example, could receive £4,405 per pupil in 2023/24, one receiving this via the 'normal' funding formula and one receiving this because the MFL has kicked in to provide the minimum of £4,405. Using our current definition, the school that receives £4,405 via the normal formula has an appropriate proportion of its additional needs funding included within its Notional SEND budget. However, because we don't currently bring in the MFL factor, the school that receives a top up to the £4,405 does not. On this basis, we take the view that the inclusion of the MFL factor within our Notional SEND budget definition will improve the fairness and equity of this definition. We have calculated 48% taking an aggregate of the %s that are used across the other factors.

10.11 Illustrative modelling, showing the impact of these 2 changes on the Notional SEND budgets of individual schools and academies, is presented at Appendix 5. We must stress that this modelling is illustrative. It is calculated on the same basis as the main Appendix 1a and 1b formula funding modelling, which is attached to our Schools Block primary and secondary mainstream formula funding consultation. Appendix 5 does not show what confirmed final 2023/24 Notional SEND budgets will be. In particular, these final budgets, which will be published in February 2023, will be influenced by the changes in data that are recorded in schools and academies within the October 2022 Census. We would also like to highlight, for the MFL schools and academies, that the increases in their Notional SEND budgets, as a result of the inclusion of the MFL factor, is offset by the other proposed changes in the definition, including the reduction in the % taken from Base £APP (AWPU) funding.

10.12 We will continue to annually review our Notional SEND definition in the lead up to the hard National Funding Formula, including in response to any further prescription from the DfE, and may consult on further incremental changes.

10.13 Please note that we intend to continue to add to Notional SEND budgets 6.0% of a mainstream school's or academy's allocation from the Early Years Single Funding Formula, for mainstream primary schools and academies that have early years entitlement provision.

10.14 Finally, we wish to highlight that our separate consultation on Schools Block formula funding also discusses this change in Notional SEND budget definition in 2023/24. What is said in the two consultation documents is the same. All primary and a secondary schools and academies are strongly encouraged to access this consultation.

Question 8 - Do you agree with the proposal to adjust our definition of Notional SEND within mainstream primary and secondary formula funding? If not, please explain the reasons why not.

11. The SEND Funding Floor Mechanism for Mainstream Primary & Secondary in 2023/24

11.1 Our SEND Funding Floor is an additional targeted SEND funding mechanism. How this mechanism works currently is explained in Appendix 3.

11.2 When we initially introduced our current Floor, at April 2021, we stated that this was for a year in trial, pending further review. When we decided to continue this Floor in 2022/23, unchanged, we again stated that the Floor's use in 2023/24 would be subject to further review.

11.3 Our EHCP Banded Model (and the national high needs funding system) works on the basis that mainstream primary and secondary schools and academies are required to contribute £6,000 (Element 2), from their already delegated formula funding derived budgets, to the cost of support for pupils with EHCPs on their rolls. Mainstream schools and academies must also use these delegated budgets to support the wider SEND and alternative provision needs of all their pupils on roll. Targeted SEND funding mechanism are intended / permitted to be used where a school's or an academy's level of SEND is 'disproportionate' (compared with other schools and academies) and their already delegated formula funding is evidenced to be insufficient to meet their additional costs. The DfE's current guidance states that, "Local authorities should have a formula or other method, based on their experience of distributing additional funding to their maintained schools and academies...In all cases, the distribution methodology should be simple and transparent, and devised so that additional funds are targeted only to a minority of schools which have particular challenges because of their disproportionate number of pupils with SEND or high needs, or their characteristics."

11.4 In our consultation documents, that have been published in the last 2 years, we have discussed the increased financial pressure on mainstream school and academy delegated budgets, as the numbers of pupils in Bradford with SEND (and EHCPs) that are educated in mainstream settings continues to grow. We have also discussed additional targeted funding mechanisms to support this pressure, in the context the DfE's national SEND Review, which we anticipate will further prescribe how such mechanisms operate in the future. As stated in section 1, the DfE's national Review focuses very strongly on supporting the inclusion of children and young people with additional needs in mainstream settings, and on universal provision / early intervention to support their needs. The Review aims to reduce the use of / reliance on Education Health and Care Plans (EHCPs), as well and on specialist places (when needs can be appropriately met in mainstream). In driving this, and in seeking greater consistency, there will be clearer guidance on what settings must do (what responsibilities they have within universal provision) and when and in what circumstances to use the EHCP and alternative provision routes of support.

11.5 In the context of the national SEND Review, there are two issues / matters to consider with our current SEND Funding Floor, when reviewing our arrangements for 2023/24.

- Firstly, the scope of our SEND Funding Floor is 'more generous' than the DfE's guidance ("*devised so that additional funds are targeted only to a minority of schools which have particular challenges*"). Only 31 (out of 152) local authorities declared within their Authority Pro-forma Tool (APT) returns to the Education and Skills Funding Agency (EFSA) that they operate any form of additional targeted SEND funding mechanism in the 2022/23 financial year. In 2020/21 (prior to the implementation of our current Floor), we allocated £0.481m in additional targeted SEND support funds, to 23% of schools / academies. In 2021/22 (in the first year of our current mechanism), we allocated £1.645m to 57% of schools / academies. At July 2022, the annual equivalent cost of our SEND Funding Floor in 2022/23 so far is £2.276m, to 53% of schools / academies. As these percentages indicate, our Floor currently allocates additional funding to more than "a minority of schools with particular challenges". These figures also highlight the significant growth in Floor spending over the last 2 financial years. We expect spending in 2022/23 to increase further in the second half of this financial year. This is one of the significant aspects of our Floor that we

need to review for 2023/24, in the context of the affordability of our High Needs Block spending priorities. Our modelling clearly indicates that we cannot afford to continue year-on-year to meet the cost of an expanding Floor mechanism, that allocates funding wider than to a minority of schools with particular challenges, at the same time as meeting the cost of the growth in EHCPs and the development of new specialist places.

- Secondly, our SEND Funding Floor calculates additional funding with reference to the number of EHCPs a school / academy has on roll. Whilst this is valid, in the longer term, as the outcomes of the SEND Review are implemented (with a movement away from a reliance on EHCPs), using a school's / academy's number of EHCPs to allocate additional targeted SEND funding will need review. It can also be argued that some 'perverse incentive' (and some movement in the opposite direction to reducing reliance on EHCPs) is present, where we use the number of EHCPs to assess the need for additional Floor Funding. However, whilst we do wish to look at this more closely, we do not propose to amend the basis for the calculation of our SEND Funding Floor in 2023/24 being the number of EHCPs on roll.

11.6 We do propose to continue to use our existing SEND Funding Floor mechanism in 2023/24, as described in Appendix 3, for a further year pending further review, but with one technical amendment. This change is aimed at incrementally controlling growth in cost and seeks to keep the scope of the mechanism as originally intended (including trying not to move further away from the DfE's guidance of funding "a minority of schools with particular challenges"). So:

- We propose to increase the phase averages that are used in the calculation of 'part B' (the trigger points at which additional Floor funding is allocated). Rather than using the phase average rounded + 1%, we propose to use the phase average rounded + 3%. All other technical aspects of the Floor will continue unchanged.
- This change has the effect of reducing the number of schools / academies that are supported, and the total value of this support, when 2023/24 is compared with 2022/23 on a like-for-like basis. In reality, the actual position in 2023/24 will be complicated, including because formula funding allocations are increasing in 2023/24 and because the numbers of EHCPs at individual schools and academies will change. Both these factors will affect the final phase average %s that are used. These %s will be confirmed in February 2023. Both these factors will also affect the actual Floor allocations that are received by individual primary and secondary schools and academies in 2023/24.
- On current modelling, the support funding allocated in 2023/24 via the Floor, calculated on the same number of EHCPs (as at July 2022), would be equivalent to the funding that was allocated in the 2021/22 financial year, at c. £1.62m, across 47% of schools / academies. We expect however, that the total value of funding allocated by the Floor will be greater than this in 2023/24, as the number of EHCPs in mainstream schools and academies continues to increase. The level of funding that the Floor will allocate therefore, will continue to be substantially higher than was allocated prior to the amendment of our Floor at April 2021. It will still represent a substantial SEND funding support mechanism for the mainstream sector.
- In proposing to amend out SEND Floor in this way, we also think that it is important to highlight that, with the substantial growth in the number of pupils with EHCPs in mainstream settings, more high needs funding is already being allocated (and will continue to be allocated) to the mainstream sector in support of high needs pupils, in the form of top-up funding.

11.7 Finally, we would like to emphasise that:

- The 2 elements of the 'part B' in the calculation (as explained in Appendix 3) will be updated for 2023/24 formula funding allocations and also for updated median phase spending averages. These will both be confirmed and fixed in February 2023.
- We will continue to protect the previous SEND Funding Floor allocations (allocations that were received in 2020/21) for the specific identified and named small primary schools and academies, as we have done for the current 2022/23 financial year.

- The SEND Funding Floor will continue not to apply to early years providers. This is because Element 2 funding is allocated in addition to top-up funding for children with EHCPs in early years settings. There is therefore, no additional pressure placed on early years providers in respect specifically of having to fund £6,000 to contribute to the cost of an EHCP.
- The SEND Floor also will continue not apply to post-16 EHCPs (and Further Education high needs provision). This is because Element 2 funding is already allocated on an agreed lagged basis.
- Further review, incorporating the implications of the DfE's national Review, will determine the position of the SEND Funding Floor after 2023/24. We are only proposing at this stage to extend our existing arrangement for a further financial year.

Question 9 – Do you agree with the continuation of our SEND Funding Floor mechanism in 2023/24, as proposed? If not, please can you explain why not.

Question 10 – Do you have any comments (including technical comments) on the SEND Funding Floor mechanism you would like the Authority to consider?

Question 11 - Are there any changes that you would wish to see made to the funding models in 2023/24 that have not been proposed? Please give details.

Question 12 – Do you have any other comments on the funding model or the proposals that you have not recorded elsewhere?

12. Consultation Responses

12.1 If you wish to discuss these proposals in more detail, or have any questions for clarification, before you submit a response, please contact Dawn Haigh using the contact details shown in section 1.

12.2 A response form is included at Appendix 6. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response. Please access the web-based questionnaire [here](#).

12.3 Please ensure that your response is submitted (either using the Appendix 6 form or by using the web-based questionnaire) by the deadline of **Tuesday 29 November 2022**. Any responses received after this date may not be included in the analysis that will be presented to the Schools Forum.

13. Next Steps

13.1 Following consideration of the responses to this consultation, and of the final formal view of the Schools Forum, our high needs funding approach will be agreed by Council in February 2023.

13.2 It is anticipated that the Schools Forum will give the Authority its final formal view on 2023/24 arrangements on Wednesday 11 January 2023.

13.3 Discussions on the Dedicated Schools Grant funding position, high needs funding matters for 2023/24, and the development and sufficiency of specialist places, will continue with the Schools Forum between now and January 2023. You are recommended to keep in touch with these discussions by visiting the Schools Forum webpage on the Council's Minutes site [here](#).

14. Equalities Impact Assessment

13.1 The Public Sector Equality Duty (PSED) of the Equality Act 2010 requires the Local Authority to give due regard to achieving the following objectives in exercising its functions:

- Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010.

- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

13.2 We assess that our high needs funding proposals for 2023/24 will have a positive impact on equalities. We have considered the impact on persons who share any of the protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation. We have focused on the protected characteristics for which the potential impact is largest, and which are most closely tied to the formula funding proposals we put forward.

13.3 The arrangements that the Local Authority proposes in this consultation for the 2023/24 financial year retain a significant amount of continuity on current practice, Dedicated Schools Grant High Needs Block distribution and formula funding policy and methodology. As such, our equalities impact assessment of our guiding High Needs Block formula funding policy for 2023/24 is neutral (representing no change on current positive practice).

13.4 The Authority proposes the continued application of the EHCP Banded Model, which was first introduced at April 2020. The impact of this model, on the funding of schools, academies and on other providers for all children and young people with EHCPs, is assessed to continue to be entirely positive. The Banded Model, as explained in Appendix 2, continues to improve the way schools and providers in Bradford are funded for children and young people with SEND with EHCPs. Although it cannot be evidenced at this stage that our change in funding model at April 2020 has directly advanced equality of opportunity for children and young people that share a protected characteristic, it is expected that this model will support this.

13.5 The Authority proposes to further uplift in 2023/24 the values of top-up funding allocated by the EHCP Banded Model and by the Day Rate Model, as set out in section 6. This means that the funding of all high needs children and young people, who are supported by these models, will increase on current values. A minimum 1% increase in all top-up funding rates (when place-element / Element 2 funding is included) is higher than the floor increase of 0.5% that the DfE has funded for mainstream schools and academies through the Schools Block settlement. Under our proposals, the funding received by special schools and special school academies will exceed (by 2.25%) the requirements of the DfE's 3% Minimum Funding Guarantee. The proposed uplifts in 2023/24 should be viewed in the context of the very significant increases that have been applied to these models in 2020/21, 2021/22 and in 2022/23. The uplifts should also be viewed in the context of the Authority's prioritisation of the £6.71m increase in High Needs Block funding in 2023/24, towards the further expansion of specialist places capacity (securing appropriate provision for high needs pupils) and of meeting the cost of the growth in the numbers of children and young people in Bradford with EHCPs via the allocation of additional top-up funding.

13.6 The Authority proposes to continue, unchanged, the additional setting-led needs factors for specialist settings and the additional separate former Teacher Pay and Pensions Grant funding. This represents no change on current positive practice.

13.7 We assess that incrementally amending our definition of Notional SEND budgets within mainstream primary and secondary formula funding allocations (section 10), as encouraged by the DfE and to bring us more in line with the common national picture in the lead up to the hard National Funding Formula, continues to support schools and academies to make effective provision for pupils with additional educational needs and with Special Educational Needs and Disabilities. The inclusion of funding allocated by the Minimum Level of Per Pupil Funding (MFL) factor will improve the fairness and equity of our definition and will help support schools and academies that receive the MFL to use the totality of their delegated funding in support of SEND. It is important to stress that an adjustment of the Notional SEND definition does not materially change the value of formula funding that an individual school or academy receives.

13.8 Whilst we are proposing an amendment to the 'part B' calculation, to increase the thresholds, as set out in section 11, the Authority proposes to continue the amended SEND Funding Floor mechanism. The level of funding that the Floor will allocate in 2023/24, will continue to be substantially higher than was allocated prior to the amendment of our Floor at April 2021. It will still represent a substantial SEND funding support mechanism for the mainstream sector. As well as continuing to support provision for pupils with EHCPs, this approach will continue to protect the funding used by mainstream schools and academies to support their wider Additional Educational Needs (AEN), SEND and Alternative Provision (AP) activities. The Floor

financially supports mainstream schools and academies that have higher proportions of pupils with EHCPs, in support of inclusion, combining also to support schools and academies that may have lower levels of AEN formula funding and that may be smaller in size. It supports schools and academies that may have some turbulence in formula funding as a result of in year pupil numbers changes. The impact of the Floor is assessed to continue to be positive. With the substantial growth in the number of pupils with EHCPs in mainstream settings, in addition to the Floor, more high needs funding is already being allocated (and will continue to be allocated) to the mainstream sector in support of high needs pupils, in the form of additional top-up funding.

15. Appendices

- Appendix 1 Summary of the Place-Plus system and how this works for different providers
- Appendix 2 Banded Model for Pupil-Led Need Top-up Funding
- Appendix 3 Technical Annex 2022/23 Approach (including Setting-Led Need factors)
- Appendix 4 Draft Planned Commissioned Places 2023/24 (Bradford-located settings)
- Appendix 5 Notional SEND Modelling (presented in a separate file)
- Appendix 6 Consultation Responses Form.

Appendix 1 – High level Summary of Place-Plus and how this works for different providers in Bradford

Type of Provision	Pre-16 Place (Core) Funding	Pre-16 Top-Up Funding (Pupil-Led Need)	Post-16 Place Funding	Post-16 Top-Up Funding (Pupil-Led Need)	Setting-Led Need Factors	Additional Support Measures
Mainstream primary & secondary (maintained schools, academies and free schools)	<p>Element 1 is included within the per-pupil funding allocated through the local school funding formula (NFF-based).</p> <p>Element 2 - the first £6,000 of additional support cost – is also already delegated with the school's formula funding allocation.</p> <p>Notional SEND defines the value of funding already allocated (see section 10).</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school.</p>	<p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be commissioned.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school.</p>	None.	<p>SEND Funding</p> <p>Floor supports</p> <p>Element 2 cost in pre-16 provisions (see section 11).</p>
Mainstream early years (nursery schools, classes and PVI providers)	<p>Element 1 is included within the per-pupil funding allocated through the local EYSFF.</p> <p>Early Years SEND Inclusion Grant allocates Element 2 (£6,000) for eligible low level emerging</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p>	n/a	n/a	None.	<p>Early Years</p> <p>SEND Inclusion Grant (EYIF).</p> <p>DAF Grant.</p>

	<p>SEND (non-EHCP) as agreed by Panel.</p> <p>Element 2 is allocated to early years EHCPs in addition to top-up.</p>	<p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school or provider.</p>				
<p>School-led Resourced Provisions (mainstream primary & secondary)</p>	<p>Elements 1 & 2 are allocated through a combination of per-pupil funding allocated through the local school's funding formula plus £6,000 per place for places occupied by pupils on roll in October in the previous year and £10,000 per place for the remainder of places agreed to be commissioned.</p> <p>Additional place-funding is allocated in real time where occupancy is exceeded, with an end of year reconciliation to ensure no overall overpayment of additional place-led funding for the actual total composite occupancy across</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school.</p>	<p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be commissioned.</p> <p>Both Elements 1 and 2 are retained by the school.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school.</p>	<p>Small Setting Protection.</p> <p>3% Cash Budget Protection.</p> <p>See appendix 3.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>

	<p>the year.</p> <p>Both Elements 1 and 2 are retained by the school.</p> <p>Element 1 is set at a minimum of £4,000 per agreed place.</p>					
<p>Local Authority-led Sensory Need Resourced Provisions (mainstream primary & secondary).</p>	<p>Elements 1 & 2 are allocated through a combination of per-pupil funding allocated through the local school's funding formula plus £6,000 per place for those occupied by pupils on roll in October in the previous year and £10,000 per place for the remainder of places agreed to be commissioned.</p> <p>The host school retains Element 1, set at a minimum of £4,000 per agreed place.</p> <p>Element 2 funding is retained by Bradford Council. This currently requires host schools to repay Element 2 back to the Council.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is retained by Bradford Council.</p>	<p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be commissioned.</p> <p>The host school retains Element 1.</p> <p>Element 2 funding is retained by Bradford Council. This currently requires host schools to repay Element 2 back to the Council.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is retained by Bradford Council.</p>	<p>Small Setting Protection.</p> <p>New Services Delegation.</p> <p>See appendix 3.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>

	<p>Additional place-funding is allocated in real time where occupancy is exceeded, with an end of year reconciliation to ensure no overall overpayment of additional place-led funding for the actual total composite occupancy across the year.</p>					
<p>Local Authority-led Resourced Provisions SEMH (mainstream primary & secondary).</p>	<p>Element 1 is allocated through a combination of per-pupil funding allocated through the local school's funding formula plus £4,000 (or the higher MFL value) for places to agreed to be commissioned but not occupied by pupils on roll in October in the previous year.</p> <p>The host school retains Element 1, set at a minimum of £4,000 (or the higher MFL value) per agreed place.</p> <p>Element 2 funding is</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is retained by Bradford Council.</p>	<p>Element 1 (based on the 16-19 national funding formula) plus Element 2 (£6,000) based on the number of places to be commissioned.</p> <p>The host school retains Element 1.</p> <p>Element 2 funding is retained by Bradford Council.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is retained by Bradford Council.</p>	<p>Small Setting Protection.</p> <p>New Services Delegation.</p> <p>See appendix 3.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>

<p>Early Years Enhanced Specialist Provisions (maintained nursery schools)</p>	<p>calculated at £6,000 per commissioned place and is retained by Bradford Council.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2). All EYESP places funded at a minimum Band 4L (assessment places).</p> <p>The top-up funding is allocated to and retained by the school.</p>	<p>n/a</p>	<p>n/a</p>	<p>Small Setting Protection. See appendix 3.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>
<p>Elements 1 & 2 are allocated through a combination of per-pupil funding allocated through the local EYSFF plus £6,000 per FTE commissioned place.</p> <p>Both Elements 1 and 2 are retained by the school.</p> <p>Additional Element 1 funding is paid using EYSFF rates for any FTE places not occupied in the EYSFF termly censuses.</p> <p>Additional place-funding is allocated in real time where occupancy is exceeded, with an end of year reconciliation to ensure no overall overpayment of additional place-led funding for the actual total composite</p>						

	<p>occupancy across the year.</p> <p>Elements 1 and 2 are combined in a fixed £10,000 per place, based on an agreed number of places to be commissioned. Additional place-funding is allocated in real time where occupancy is exceeded, with an end of year reconciliation to ensure no overall overpayment of additional place-led funding for the actual total composite occupancy across the year.</p> <p>Retained by the school.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Banded Model (see appendix 2).</p> <p>The top-up funding is allocated to and retained by the school.</p>	<p>£10,000 per place based on an agreed number of places.</p> <p>Additional place-funding is allocated in real time where occupancy is exceeded, with an end of year reconciliation to ensure no overall overpayment of additional place-led funding for actual total composite occupancy across the year.</p> <p>Retained by the school.</p>	<p>Uses the Banded Model (see appendix 2).</p>	<p>Split Sites.</p> <p>Post 16 Element 1 enhancement.</p> <p>New Services Delegation.</p> <p>Small Setting Protection.</p> <p>3% Cash Budget Protection.</p> <p>See appendix 3.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>
<p>PRUs & AP Academies (funding provision for pupils permanently excluded).</p>	<p>Elements 1 and 2 are combined in a fixed £10,000 per place, based on an agreed number of places to be commissioned.</p> <p>Retained by the PRU / AP Academy.</p> <p>Additional place-</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p> <p>Allocated in 'real time' during the year. Changes for starters and leavers.</p> <p>Uses the Day Rate Model (see section 8)</p>	<p>n/a</p>	<p>n/a</p>	<p>No specific additional factors – setting-led need costs are to be covered within the calculation of the Day Rate.</p>	<p>Former Teacher Pay and Teacher Pensions Grants</p>

<p>Independent Schools</p>	<p>The place funding system doesn't operate in independent schools.</p>	<p>Agreed per-pupil top-up paid by the commissioning local authority.</p>	<p>The place funding system doesn't operate in independent schools.</p>	<p>Additional place-funding (element 2 only) can be allocated in year where occupancy exceeds agreed places, with an end of year reconciliation to ensure no overall overpayment. Both Elements 1 and 2 are retained by the institution.</p>	<p>starters and leavers. Uses the Banded Model (see appendix 2). Typically, values are funded at 60% for most placements (adjusted for the additional 40 hours). Higher cost placements (low incidence high need) are typically funded on an actual cost basis.</p>	<p>None.</p>	<p>Former Teacher Pensions Grant (for EHCPs)</p>
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Appendix 2

The EHCP Banded Model for Funding Pupil-Led Need Top-up 2023/24

Introduction

1.1 Top-up funding (also known as Element 3 or 'Plus' funding) is the funding required by an institution, over and above place funding, to enable a child or young person with high needs to participate in education and learning. Top-up funding is expected to reflect the cost of additional support an institution incurs related to the individual needs of the child or young person.

1.2 As with many authorities, Bradford allocates top-up funding using a band model. This model is used to assign Education Health and Care Plans (EHCPs) into bands of need for funding purposes. Each band has an applicable level of funding and every EHCP assigned to a band is allocated a set value of funding.

1.3 At April 2020, for the 2020/21 financial year, we introduced a new Banded Model. This model replaced our previous 'Ranges Model' and quite significantly uplifted the funding of EHCPs in all settings. This model includes protections, which have ensured, and will continue to ensure, that no EHCP in place on 1 April 2020 reduces in value as a result of funding model change. We substantially uplifted the values allocated by the Banded Model in 2021/22, and again in 2022/23, as set out in our consultation published this time last year.

1.4 A band system is more responsive to the needs of an individual child or young person than a blanket lump sum style approach but is not quite as sensitive as an approach where the cost of the needs of a child or young person is calculated on an exact basis. Blanket, band, and individually-costed systems all have pros and cons. The main positive features of band models, and of our Banded Model, are that these help promote consistency and transparency, reduce complication, support the quick assessment and release of funds, whilst also enabling the SEND Panel to find a 'close fit' for funding the needs of an individual child or young person with an EHCP.

1.5 In continuing to use our Banded Model in 2023/24, the Council's intention is still to retain a uniform framework for calculating top-up funding for EHCPs. The Council's expectation continues to be that this framework will enable a close fit to be found for the funding of the vast majority of EHCPs and will ensure consistency of approach in the funding of high needs across mainstream and specialist settings both pre and post 16. It is accepted that there will be a small number of children or young people that will sit outside this banded framework, most of whom will be placed in specialist independent provisions.

1.6 We are not proposing technical changes to our Banded Model in 2023/24. We do propose however, to uplift the rates of top-up funding that this model allocates. Please see section 6 for explanation of the uplifted values that are proposed. Below is a summary of how the Banded Model operates.

The Banded Model 2023/24

2.1 The Banded Model uses at its base the Bradford Matrix of Need, which outlines waves of intervention:

- Band 1 (Quality First Teaching)
- Band 2 (SEND Support)
- Band 3 (EHCP) – typically mainstream - this is the band at which Element 3 EHCP funding begins
- Band 4 (EHCP Plus) – typically specialist provision

This Matrix identifies the responsibilities of schools and providers in their use of already delegated funds in meeting the cost of support up to Band 3. It then identifies the point at which top-up funding will begin in our model, which is EHCP Band 3.

2.2 The Banded Model has 6 bands and 6 funding steps, with values for 1 April 2023 proposed as set out in the table below. This table shows the proposed value of top-up by band and the value of Element 2

contributions, which schools and providers will add to the top-up from their budgets to produce the total value of funding available for supporting the costs of an EHCP.

In all steps within the model the school / provider, with the exception of EHCPs for 2, 3 and 4 year olds (in pre-reception) in mainstream not specialist provision, is expected to contribute Element 2 funding, currently at a value of £6,000 per 1 FTE, to the cost of the additional needs set out in the EHCP. For EHCPs for 2, 3 and 4 year olds (in pre-reception) in mainstream not specialist provision, that are only funded through the Early Years Single Funding Formula (EYSFF), because the EYSFF does not allocate Element 2 funding, Element 2 is allocated on an FTE basis in addition to the top-up value for these EHCPs until these children enter reception year. This addition does not apply to early years children that are placed in special schools or in resourced provisions as these provisions are funded on a place-led basis, which includes Element 2.

	Proposed Indicative Top-up Value at April 2023	Element 2 Value FTE the school / provider adds	Total Value of Funding to support the EHCP
Band 3 Low (3L)	£2,318	£6,000	£8,318
Band 3 Medium (3M)	£4,136	£6,000	£10,136
Band 3 High (3H)	£5,900	£6,000	£11,900
Band 4 Low (4L)	£9,411	£6,000	£15,411
Band 4 Medium (4M)	£13,524	£6,000	£19,524
Band 4 High (4H)	£17,678	£6,000	£23,678
Protected 7	£29,048	£6,000	£35,048

The model is calculated on a provision-mapping approach. The additional educational needs of a child with an EHCP typically will be met through additional adult contact time. Typically, this will be delivered in a combination of individual time and time in smaller groups. The overall volume of time will increase as needs increase and the proportion of this time that is delivered on a more bespoke basis will also increase as needs increase. The values of the bands have been built up on assumptions about the proportion of additional support given to an EHCP, with this support split between bespoke time and time in smaller groups. This is a model for the SEND Panel to use to determine the volume and type of support required to then closely meet the needs of an individual EHCP.

2.3 Band 3 (EHCP) typically will support the cost of EHCPs placed in mainstream provisions. Band 4 (EHCP plus) typically will support the cost of EHCPs placed in specialist provisions. However, this is not an absolute position and the SEND Panel will use the model flexibly to closely meet need.

The Band 3 values are calculated on assumptions on additional 'support assistant' time (where bespoke means 1:1 and group time is in groups of 1:3). The cost per hour assumption within the indicative 2023/24 financial year model, on a term time only basis and incorporating assumptions about on-costs, is £16.95. This represents a 1.00% increase on the £16.78 that was used in the 2022/23 model.

The Band 4 values are calculated on assumptions on both support assistant time (where bespoke means 1:1 and group time is in groups of 1:2) and teacher time in group sizes of 1:12, 1:8 and 1:6. The cost per hour assumption for support assistant time within the indicative 2023/24 financial year model is £16.95 as in Band 3. The indicative cost per hour assumption for teacher time in the model is £49.42. This represents a 1.8% increase on the £48.56 that was used in the 2022/23 model.

2.4 Each EHCP will be funded at the band value that provides the closest fit for meeting the cost of the needs of the child or young person. In the model, the closest fit may also be found by combining ('stacking') more than one band value. The facility to combine values means that the SEND Panel can use the model in a flexible way to find a very close fit for the funding especially of children and young people with significant secondary needs as well as those that require additional functional support both within and outside of the standard taught school day where this is not already funded within a single band value.

2.5 It is helpful to continue to highlight the main differences between our current Banded Model and our previous Ranges Model that was used up to 31 March 2020:

- The Banded Model does not have a 7th step (the equivalent of the previous Range 7). It is expected that stacking will deliver a level of support higher than the single band 4H, where this is necessary. Specific transition arrangements are in place for Range 7 EHCPs that existed at 1 April 2020.
- The Panel can 'stack' values (meaning an EHCP can be allocated more than one value) in order to find a close fit.
- The Banded Model does not use primary need as a marker for the placement of an EHCP into a band. Placement is based on assessed level of need.
- Whereas the previous Ranges Model defined need in terms of 1:1 hours of support, the Banded Model uses a provision mapping approach and a combination of bespoke time and time in smaller groups.
- The values allocated by the Banded Model are significantly increased on those allocated by the Ranges Model. These increases are the result of two main adjustments between 2020 and 2023; a) refreshing the assumptions about the salaries of support assistants and teachers; b) allowing the top-up model to compensate for the fixed £6,000 Element 2. Please see section 6 for explanation of this.
- The Banded Model works alongside a clarified / amended approach to the sharing of the cost of specialist equipment.

2.6 To highlight how the Banded Model continues to be the same or similar to the previous Ranges Model:

- Decisions on the application of the Banded Model – which of the 6 bands an EHCP is placed in and whether an EHCP is given more than one band value - continue to be taken by Bradford Council's SEND Panel with reference to the evidence submitted through the EHCP assessment process. Appeals and disputes also continue to be resolved through the Panel process.
- In all steps within the model, the school / provider, with the exception of EHCPs for 2, 3 and 4 years olds (pre-reception) in mainstream not specialist provision, is expected to contribute Element 2 funding currently at a value of £6,000 to the cost of additional needs.
- The bottom 'threshold' for the 1st step of Band 3 (3 Low) is the same as the Ranges Model. The Banded Model itself has not changed the threshold at which EHCP funding can initiate nor has it changed the points of access to an EHCP. It simply has changed the options that are available to the SEND Panel to use to ensure that an EHCP is appropriately and accurately funded.
- For the top-up funding of post 16 high needs students with EHCPs in the Further Education sector, it has been agreed previously with the relevant providers that, as, on average, colleges deliver around 60% of the hours delivered by schools, colleges are funded for the vast majority of students at 60% of the Banded Model value for the primary need of the student. The exceptions are students with the primary need of sensory impairment (Hearing / Visual), where funding continues to be allocated on an actual cost basis. Due to the specific support needs of these students in Further Education, and the diverse nature of

their curriculum choices, it is not possible to formularise this funding element. This approach is continued in the application Banded Model in 2023/24, adjusted for funding, as appropriate, for the delivery of the additional 40 post-16 study hours, which is part of the 2022/23 post-16 financial settlement and part of the Government's COVID-19 pandemic support response.

- The 'technical framework' is the same for the operation of the Banded Model during the year e.g. the monthly re-calculation of EHCP funding from the census of EHCPs on roll on 10th of each month.
- An assessment place (which was Range 4D) has become Band 4L. This funds EHCPs placed in specialist provisions until a final determination of band from the Panel is received. Funding is changed at this point if this is different from 4L. Band 4L also continues to be used to more permanently fund placements in the Early Years ESPs that are attached to maintained nursery schools.

A reminder of the transition from the previous Ranges Model

3.1 It is helpful to remind providers of how we moved from the Ranges Model to the now established Banded Model and what protections continue to be in place. All EHCPs in place at 1 April 2020 were automatically transferred on to the new Banded Model system at 1 April 2020 as follows:

Range		Band
Range 4A	became	Band 3L
Range 4B	became	Band 3M
Range 4C	became	Band 3H
Range 4D	became	Band 4L
Range 5	became	Band 4M
Range 6	became	Band 4H
Range 7	became	Protected 7

3.2 Most existing EHCPs on an on-going basis will remain within the band they were transferred to. The SEND Panel will continue to review, through the annual review process, individual EHCPs where the banding may be disputed, where there are obvious existing inaccuracies or where the needs of the child or young person have changed.

3.3 The Banded Model operates under the guarantee that, for EHCPs in place at 1 April 2020, the EHCP will not ever drop to a lower valued band unless the SEND Panel agrees that the needs of the child or young person are reduced when compared against the needs presented to the Panel in the original EHCP determination. This guarantee remains until the pupil reaches the end of year 11. This guarantee does not extend to assessment places that were funded at 1 April 2020 (as these pupils did not yet have EHCPs).

3.4 The Banded Model retains a transitional 'Protected 7' band, which will continue to fund EHCPs that were graded at Range 7 under the old model. These Range 7 pupils will stay funded by the Protected 7 band unless an annual review gives them a higher level of funding using the new model (via stacking), when the pupil would be transferred onto the new model at this point, or where the pupil's needs are agreed to have reduced when compared against the needs presented to the Panel in the original EHCP Range 7 determination. This guarantee remains in place until the pupil reaches the end of year 11. The value of Protected 7 will be uplifted each year by the same % that is applied to Band 4H.

Appendix 3 – Technical Annex 2022/23 Approach

This appendix contains more technical detail on the definitions and calculations of factors that are contained within Bradford Council's CURRENT 2022/23 financial year EHCP high needs funding model.

Notional SEND Budgets (Mainstream Schools Block Primary & Secondary)

Local authorities are required to define for each primary and secondary school and academy the value of mainstream formula funding that is 'notionally' allocated for SEND (for meeting the first £6,000 of needs both for pupils with EHCPs and the needs of pupils without EHCPs). How Bradford currently defines notional SEND in the 2022/23 financial year (the %s of funding in each formula factor that make up this budget) is shown in the table below.

Formula Factor	% Primary	% Secondary
Prior Low Attainment	100%	100%
Free School Meals Factor	23.1%	10.2%
IDACI Factor	22.4%	19.2%
Base £APP	7.5%	6.3%

In addition, 6.0% of a mainstream school's or academy's allocation from the Early Years Single Funding Formula, for mainstream primary schools and academies that have early years entitlement provision, is also defined to be available for supporting SEND in early years.

Following the introduction of the Minimum Level of Per Pupil Funding Factor (MFLs) in the primary and secondary funding formula, some mainstream schools and academies now receive what can be determined to be Additional Educational Needs (AEN) pupil-led funding through the MFLs, rather than through the AEN formula factors, which are used to define published notional SEND budgets. For point of clarity therefore, although the Authority has not yet brought MFL funding into the definition of notional SEND, the Authority will consider MFL allocations within discussions that may be had with individual schools and academies about available delegated SEND monies.

Please see section 10, where the Authority proposes to amend the definition of notional SEND budgets for 2023/24.

SEND Funding Floor (Mainstream Primary & Secondary)

Please see section 11 for further discussion on the position of this factor for 2023/24. How the Floor works currently in 2022/23 is described below.

The SEND Funding Floor is aimed at ensuring that no mainstream primary or secondary school or academy will have to manage from their own mainstream delegated formula funding an above phase-average cost pressure in respect of their commitment to meet the cost of Element 2 £6,000 for their EHCPs. As well as supporting provision for pupils with EHCPs, this approach helps to protect the funding used by schools and academies to support their wider Additional Educational Needs, SEND and Alternative Provision activities. It directly financially supports schools and academies that have higher proportions of pupils with EHCPs, in support of inclusion, combining also to support schools and academies that may have lower levels of maintained Additional Education Needs formula funding (because they have e.g. lower levels of deprivation) but higher numbers of EHCPs and also that may be smaller in size. It supports schools and academies that may have some turbulence in formula funding as a result of in year pupil numbers changes.

The formula for 2022/23 is as follows:

The SEND Funding Floor is re-calculated on a monthly basis for changes in the numbers of Education Health and Care Plans (EHCPs) on roll.

Where A is greater than B a school / academy receives a top-up for the difference between A and B.

A = is the Full Time Equivalent (FTE) number of EHCPs in a school / academy (mainstream provision, excluding early years and post 16 students) multiplied by £6,000 (Element 2).

B = is the % of a school's Additional Educational Needs delegated formula funding that is required to be put to the Element 2 £6,000 cost of a school's EHCPs, before the SEND Funding Floor will provide additional financial support. There are 2 parts to the calculation, the % and what is meant by Additional Educational Needs delegated formula funding. Both these are fixed for the 2022/23 financial year, as follows

- The % is the phase median average % of Additional Educational Needs formula funding that schools / academies contribute to Element 2 £6,000 costs in respect of their EHCPs. The phase average is rounded plus 1%. Separate percentages are used for primary and for secondary phases. For 2022/23, these averages are set at 11% for the primary phase and 10% for the secondary phase.
- Additional Educational Needs delegated formula funding is calculated by taking the following funding factors within the delegated formula funding allocations received by mainstream schools / academies. For maintained schools, this is within their Section 251 Budget Statement funding. For academies, this is within their General Annual Grant (GAG) funding:

100% of the English as an Additional Language factor

100% of the Free School Meals factors

100% of the Prior Attainment factor

100% of the Minimum Funding Level factor

100% of the Income Deprivation Affecting Children Index (IDACI) factor

80% of Minimum Funding Guarantee factor

Setting-Led Needs Factors – Maintained Special Schools & Special School Academies

- New Services Delegation – an additional amount per pupil to reflect that stand alone special schools and special school academies cannot access de-delegated and centrally managed services without charge – set at a flat £449.88 per pupil in 2022/23. So a setting with 100 pupils receives $100 \times £449.88 = £44,988$ funding.
- Small Setting Protection – an additional sum, for stand-alone settings with fewer than 75 places, to ensure a minimum level of funding for fixed costs. The formula is:

A (75 x £10,000 x 20%)

B (setting's place funding x 20%)

= top-up to the value of A where B is less than A

As all special schools and special school academies are now larger than 75, this is not a factor that is currently employed.

- Split Sites – an additional sum for special schools and special school academies that operate across split / satellite sites. The full year value of this lump sum is £226,740 in 2022/23.
- Post-16 Places – an additional sum per Post-16 place, to allocate an additional £1,200 per place. This ensures that special schools with post-16 places receive the nationally set DfE value of element 1 for post-16 pupils, which is £5,200 for the 2021/22 academic year. This has increased to £5,600 for the 2022/23 academic year. We propose to uplift this sum to £1,600 in our 2023/24 financial year formula.
- 3% Cash Budget Protection – an additional total cash budget safety net protection, which ensures that at no point during 2022/23 will the total 'Place Plus' calculated budget for an individual special school be more than 3% lower than the 2021/22 total level of funding. As most special schools are / have been increasing places, together with the uplifted Banded Model funding rates, this is not a factor that was needed in 2022/23, but will remain in place to ensure a safety net (in 2023/24, in places to protect the difference between 2023/24 and 2022/23 financial year allocations).

Setting-Led Needs Factors – School-Led Resourced Provisions Mainstream Primary & Secondary Schools and Academies

- Small Setting Protection – an additional sum for provisions with fewer than 24 FTE places, to ensure a minimum level of funding for fixed costs. The formula is:
A (24 FTE x £10,000 x 20%)
B (setting's place funding (where each place is worth £10,000) x 20%)
= top-up to the value of A where B is less than A
- 3% Cash Budget Protection – as special schools above.

Setting-Led Needs Factors – Local Authority-Led Resourced Provisions Mainstream Primary & Secondary Schools and Academies (both Sensory and SEMH)

Please note that the Local Authority retains this top-up funding.

- Small Setting Protection – an additional sum for provisions with fewer than 24 FTE places, to ensure a minimum level of funding for fixed costs. The formula is:
A (24 FTE x £10,000 x 20%)
B (setting's place funding (where each place is worth £10,000) x 20%)
= top-up to the value of A where B is less than A
- New Services Delegation – as special schools above. This is allocated because the Authority's centrally managed services do not access services and funds that are otherwise funded for school-led resourced provisions through de-delegation within the Schools Block.

Setting-Led Needs Factors – Early Years Enhanced Specialist Provisions

- Small Setting Protection – as School-Led Resourced Provisions above.

Appendix 4 - 2023/24 Draft Commissioned Places

Setting	Type (AP or SEND)	22/23 Initial Planned Budget AY Places (FTE)	23/24 FY Apr-Aug Current Planned Places (FTE)	23/24 AY Current Planned Places (FTE)
Bradford Alternative Provision Academy	AP	65.0	65.0	65.0
Park Aspire	AP	90.0	90.0	90.0
Other Alternative Provision	AP	10.0	10.0	10.0
Centrally Managed EinH, Tracks and Medical Home Tuition Service "notional" places	AP	49.0	49.0	49.0
Early Years Resourced Provision - Abbey Green Nursery School	SEND	6.0	6.0	6.0
Early Years Resourced Provision - Canterbury Nursery School and Children's Centre	SEND	16.8	16.8	16.8
Early Years Resourced Provision - Hirst Wood Nursery School	SEND	0.0	6.0	6.0
Early Years Resourced Provision - Midland Road Nursery School	SEND	6.0	6.0	6.0
Early Years Resourced Provision - St Edmund's Nursery School and Children's Centre	SEND	19.8	19.8	19.8
Early Years Resourced Provision - Strong Close Nursery School	SEND	18.0	18.0	18.0
Early Years Resourced Provision - Balance of places (flex inc. for 30 hours provision)	SEND	11.4	5.4	5.4
Resourced Provision LA Led - Girdlington Primary School	SEND	20.0	20.0	20.0
Resourced Provision LA Led - Swain House Primary School	SEND	20.0	20.0	20.0
Resourced Provision LA Led - Grove House Primary School	SEND	12.0	12.0	12.0
Resourced Provision LA Led – Hanson School	SEND	48.0	48.0	48.0
Special – Beechcliffe School	SEND	248.0	248.0	248.0
Special – Chellow Heights School	SEND	250.8	250.8	250.8
Special – Co-op Academy Delius	SEND	171.0	171.0	171.0
Special – Beckfoot Hazelbeck Academy	SEND	144.0	144.0	144.0
Special – High Park School	SEND	130.0	130.0	130.0
Special – Beckfoot Phoenix Primary Special School	SEND	102.0	102.0	102.0
Special – Co-op Academy Southfield	SEND	360.0	360.0	360.0
Special – Oastler School	SEND	134.0	134.0	134.0
Resourced Provision School Led – Carrwood Primary School	SEND	12.0	12.0	12.0
Resourced Provision School Led – Denholme Primary School	SEND	8.0	8.0	8.0
Resourced Provision School Led – Green Lane Primary School	SEND	24.0	24.0	24.0
Resourced Provision School Led – High Craggs Primary Academy	SEND	6.0	6.0	6.0
Resourced Provision School Led – Crossflatts Primary School	SEND	16.0	16.0	16.0
Resourced Provision School Led – Beckfoot Academy	SEND	6.0	6.0	6.0
Resourced Provision School Led – Oasis Academy (Lister Park)	SEND	16.0	16.0	16.0
Resourced Provision School Led – Co-op Academy Grange	SEND	24.0	24.0	24.0
Resourced Provision School Led – Parkside School	SEND	14.0	14.0	14.0
Resourced Provision School Led – The Holy Family Catholic School	SEND	20.0	20.0	20.0
Resourced Provision School Led – Beckfoot Thornton Academy	SEND	16.0	16.0	16.0
Resourced Provision School Led – Titus Salt School	SEND	30.0	30.0	30.0
Resourced Provision School Led – Bradford Academy	SEND	27.0	27.0	27.0
Resourced Provision School Led – Bradford Forster Academy	SEND	10.0	10.0	10.0
Resourced Provision School Led – Haworth Primary Academy	SEND	12.0	12.0	12.0
Resourced Provision School Led - Crossley Hall Primary School	SEND	24.0	24.0	24.0
Resourced Provision School Led - Long Lee Primary School	SEND	16.0	16.0	16.0
Resourced Provision School Led - Worth Valley Primary Academy	SEND	8.0	8.0	8.0
Resourced Provision School Led - Parkwood Primary Academy	SEND	12.0	12.0	12.0
Resourced Provision School Led - Cottingley Village Primary School	SEND	16.0	16.0	16.0
Resourced Provision School Led - Horton Park Primary Academy	SEND	12.0	12.0	12.0
Resourced Provision School Led - Ilkley Grammar School	SEND	20.0	20.0	24.0
Resourced Provision School Led - Holybrook Primary School	SEND	16.0	16.0	16.0
Resourced Provisions LA Led - Primary Phase	SEND	86.0	104.0	104.0
Resourced Provisions LA Led - Secondary Phase	SEND	50.0	68.0	68.0
Further Education - Bradford College (Subject to Further Review)	SEND	220.0	220.0	220.0
Further Education - Shipley College (Subject to Further Review)	SEND	148.0	148.0	148.0
Further Education - Aspire I (Subject to Further Review)	SEND	36.0	36.0	36.0
SEND - Additional Places Under Development (still to go through Statutory Process)	SEND	120.0	80.0	164.0
Grand Totals		2,956.8	2,952.8	3,040.8
Sub Totals SEND		2,742.8	2,738.8	2,826.8
<i>Early Years Resourced Provision</i>		<i>78.0</i>	<i>78.0</i>	<i>78.0</i>
<i>Local Authority Led Resourced Provisions - Sensory</i>		<i>100.0</i>	<i>100.0</i>	<i>100.0</i>
<i>Maintained Special Schools and Special Academies</i>		<i>1,539.8</i>	<i>1,539.8</i>	<i>1,539.8</i>
<i>School Led Resourced Provisions</i>		<i>365.0</i>	<i>365.0</i>	<i>369.0</i>
<i>Local Authority Led Resourced Provisions</i>		<i>136.0</i>	<i>172.0</i>	<i>172.0</i>
<i>Further Education (Post 16)</i>		<i>404.0</i>	<i>404.0</i>	<i>404.0</i>
<i>Additional SEND Places not yet allocated</i>		<i>120.0</i>	<i>80.0</i>	<i>164.0</i>
Sub Totals Alternative Provision		214.0	214.0	214.0
<i>PRUs & Alternative Providers</i>		<i>165.0</i>	<i>165.0</i>	<i>165.0</i>
<i>Education in Hospital, Tracks (notional places)</i>		<i>49.0</i>	<i>49.0</i>	<i>49.0</i>

Appendix 6 - RESPONSES FORM

Consultation on Funding High Needs Provision 2023/24

This form can be used to submit your response. However, this year we have introduced a web-based questionnaire, which we encourage you to use to submit your response, instead of using this paper form. Please access the web-based questionnaire here.

Name _____ Setting Name _____

THE DEADLINE FOR RESPONSES TO THIS CONSULTATION IS TUESDAY 29 NOVEMBER 2022

Please send completed questionnaire responses to:

School Funding Team
City of Bradford Metropolitan District Council
1st Floor, Britannia House,
Hall Ings
Bradford
BD1 1HX

Tel: 01274 433775

Email: dawn.haigh@bradford.gov.uk

Please complete the questionnaire by marking the appropriate boxes. There is a space below each question for you to record comments.

Question 1 – Do you agree with the approach that is proposed for uplifting the values of the EHCP Banded Model in 2023/24? If not, please can you explain why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 2 – Do you have any comments (including technical comments) on the EHCP Banded Model you would like the Authority to consider for 2023/24?

Question 3 – Do you agree with the approach to setting-led need factors in 2023/24 that is proposed? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 4 – Do you have any comments (including technical comments) on the setting-led need factors you would like the Authority to consider for 2023/24?

Question 5 – Do you agree with the Day Rate mechanism that the Authority proposes to use to fund the PRU / Alternative Provision Academy in 2023/24? If not, please can you explain why not.

Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 6 – Do you have any comments (including technical comments) on the proposed Day-Rate mechanism you would like the Authority to consider for 2023/24?

Question 7 – Do you agree with the methodology that the Authority proposes to use to allocate the Teacher Pay Grant and Teacher Pensions Grant in 2023/24? If not, please can you explain why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 8 – Do you agree with proposal to adjust our definition of Notional SEND within mainstream primary and secondary formula funding? If not, please can you explain why not.

Strongly Agree On Balance Agree (some reservations) Strongly Disagree

If not, please provide further explanation here:

Question 9 – Do you agree with the continuation of our SEND Funding Floor mechanism in 2023/24, as proposed? If not, please can you explain why not.

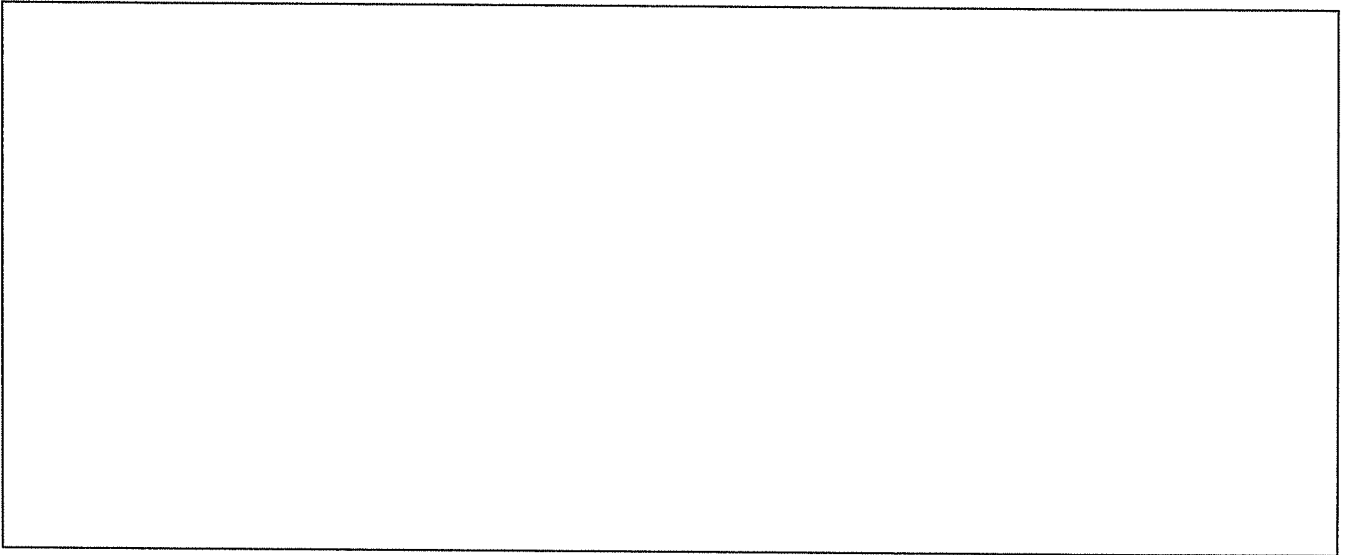
Strongly Agree **On Balance Agree (some reservations)** **Strongly Disagree**

If not, please provide further explanation here:

Question 10 – Do you have any comments (including technical comments) on the SEND Funding Floor mechanism you would like the Authority to consider?

Question 11: Are there any changes that you would wish to see made to the funding models in 2023/24 that have not been proposed? Please give details.

Question 12 – Do you have any other comments on the funding models or on the proposals that you have not recorded elsewhere?

A large, empty rectangular box with a thin black border, intended for the user to provide their comments on funding models or proposals.

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SCHOOLS FORUM AGENDA ITEM

For Action



For Information



Brief Description of Item (including the purpose / reason for presenting this for consideration by the Forum)

This report asks the Schools Forum to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items for the 2023/24 financial year.

Members representing Maintained Primary Schools are asked to decide on de-delegation in 2023/24 for the purposes of purchasing subscriptions to Fischer Family Trust.

Date (s) of any Previous Discussion at the Forum

A final report on centrally managed funds to be held across the Schools, Central Schools Services and Early Years Blocks in the 2022/23 financial year was presented to the Forum on 12 January 2022.

The Schools Forum, in a separate report to this meeting, is asked to agree the publication of the primary and secondary consultation document, which asks for feedback on the continuation in 2023/24 of Schools Block de-delegated funds. This consultation also asks for feedback on the Growth Fund and on the Falling Rolls Fund. Feedback from the consultation will be considered by the Forum at the next meeting in December.

In making recommendations, back in 2017/18, secondary phase representatives agreed the cessation of de-delegation for the Maternity / Paternity 'insurance' scheme, Fischer Family Trust, Exceptional Circumstances and School Staff Public Duties and Suspensions from the secondary phase. Members are reminded that the de-delegated fund for Minority Ethnic School Support ceased on 1 May 2016 and the DSG's Contribution to School Improvement (our 'historic commitment') ceased at 1 September 2017. De-delegation from the primary phase for behaviour support ceased at 1 September 2018.

Background / Context

Forum Members are reminded that the Central Schools Services Block was established within the DSG framework at April 2018. Some centrally managed funds, previously held within the Schools Block, have now been transferred into this Block. As such, these funds should no longer be seen as 'top-slices' from primary and secondary formula funding. They are allocations via a national DSG formula to support the statutory functions authorities hold for all schools and academies. The table below summarises the centrally managed funds that were agreed from the 2022/23 DSG (excluding monies allocated from brought forward balances and funds held initially and then delegated during the year within the Early Years Block e.g. EYPP and EYIF).

Fund	Schools Block	Central Schools Services Block	Early Years Block	Total
Copyright Licences	n/a	£367,500	£32,981	£400,481
Growth Fund (net of recoupment)	£1,051,498	n/a	n/a	£1,051,498
Falling Rolls Fund (Primary)	£0	n/a	n/a	£0
Schools Forum costs	n/a	£11,000	n/a	£11,000
Pupil Admissions	n/a	£931,300	n/a	£931,300
Statutory & Regulatory Duties	n/a	£1,559,343	n/a	£1,559,343
Education Access Officers	n/a	£472,000	n/a	£472,000
Education Planning & Early Years	n/a	£140,000	£100,000	£240,000
Early Years PVI Area SENCOs	n/a	n/a	£204,000	£204,000
DD - FSM Eligibility Assessments	£47,047	n/a	n/a	£47,047
DD - Fischer Family Trust	£27,229	n/a	n/a	£27,229
DD – School Improvement	£133,000	n/a	n/a	£133,000
DD - School Maternity / Paternity	£476,746	n/a	£73,254	£550,000
DD - Trade Union Facilities Time	£134,335	n/a	£15,647	£149,982
DD - Trade Union Health and Safety	£20,528	n/a	£2,391	£22,919
DD - Public Duties & Suspensions	£21,844	n/a	£3,356	£25,200
DD - Re-Org: Safeguarded salaries	£14,842	n/a	n/a	£14,842
DD – Re-Org: Deficit Budgets	£0	n/a	n/a	£0
DD - Exceptional Costs & SIFD	£61,300	n/a	n/a	£61,300
Totals	£1,988,369	£3,481,143	£431,629	£5,901,141

Background / Context (continued)

The table below summarises the per pupil contributions from the Early Years Block and from maintained schools within the Schools Block to the funds marked as 'de-delegated' ('DD') in the previous table.

2022/23 De-delegated Funds	Early Years £app	Primary £app	Secondary £app
Fischer Family Trust	n/a	£1.16	n/a
Schools Improvement	n/a	£4.29	£4.29
School Maternity / Paternity	£20.29	£20.29	n/a
Trade Union Facilities Time	£4.33	£4.33	£4.33
Trade Union Health and Safety	£0.66	£0.66	£0.66
Public Duties & Suspensions	£0.93	£0.93	n/a
Re-Org: Safeguarded salaries	n/a	£0.59	£0.14
Re-Org: Deficit Budgets (paused)	n/a	£0.00	n/a
Exceptional Costs & Schools In Financial Difficulty	n/a	£2.61	n/a
Total £app maintained schools	£26.21	£34.86	£9.42
FSM Eligibility Assessments (Per FSM Ever 6)	n/a	£5.80	£5.14

Appendix 1 provides a summary of the comparison of our funds versus those held by other local authorities in the 2022/23 financial year.

Details of the Item for Consideration

The information contained in this report is presented to initiate the School Forum's annual review of centrally managed and de-delegated funds held within the Central Schools Services, Schools and Early Years Blocks. Forum will be required to make its recommendations and take its decisions on 2023/24 financial year funds on 11 January 2023. An update to this report will be presented to the Forum in December. **In particular, at this stage, Forum Members are asked to consider whether / what further information is needed. Owing to timescales set by Fischer Family Trust, it is necessary to ask Members representing Maintained Primary Schools to decide at this meeting on de-delegation in the 2023/24 financial year for the purposes of purchasing subscriptions to Fischer Family Trust.**

General Parameters and Expectations for 2023/24 Financial Year Funds

It is anticipated that:

- Forum will not wish to revisit decisions that have been made in previous years to cease specific centrally held and de-delegated funds.
- Forum will wish to continue the general framework of de-delegation from maintained schools, as is currently agreed, whilst further considering the values of de-delegated funds that are held in 2023/24.
- Forum will continue to agree to the apportionment, across the blocks on the basis of pupil numbers, of the DfE-set copyright licences cost.
- Forum will agree to continue the 'pass back' of funds already allocated to the Authority within the Central Schools Services Block, as a result of Forum decisions taken in previous years.
- Forum will agree to uplift, for pay award / inflation, Central Schools Services Block (CSSB) funds and centrally managed funds within the High Needs Block (HNB) and Early Years Block (EYB). The uplifts in CSSB funds will be afforded by the CSSB settlement (not by transferring funds from other DSG blocks).
- Forum will continue the policy of managing any overall over-spending in CSSB budgets, initially, by writing this off from the value of CSSB surplus balance previously transferred into the Schools Block.
- Forum will support continuing to charge a proportion of the cost of centrally managed high needs services, relating to early years aged children, to the Early Years Block, whilst further considering the value of this charge in 2023/24.
- The Schools Block Growth Fund for 2023/24 will be set at a value sufficient to cover anticipated costs. It is anticipated that no new budget will be taken for the cost of new growth at September 2023 in the primary phase, with ring-fenced Schools Block brought forward surplus balance being available.
- The primary phase Falling Rolls Fund will continue within the Schools Block, but will be financed from the ring-fenced brought forward balance rather than by taking new budget from the 2023/24 DSG allocation.
- The remaining costs of safeguarded salaries, incurred by the re-organisation of maintained schools, will continue to be funded via de-delegation within the Schools Block on an actual reducing costs basis.
- As Forum has recently reviewed the Authority's Trade Unions Facilities Time arrangements, these arrangements will continue in 2023/24 at the existing agreed rate of per pupil contribution.
- Forum will continue to support the retention of a de-delegated fund to meet any cost of deficit balances held by maintained primary schools that convert to academy status under sponsored arrangements.

Details of the Item for Consideration (continued)

- Forum will support the retention of a de-delegated fund to replace the ceased School Improvement Monitoring and Brokering Grant (SIMB), whilst further considering the value of this fund in 2023/24.
- The Forum will not wish to newly de-delegate from the Schools Block for the purposes of subscribing all maintained primary and secondary schools en-mass to the DfE's Risk Protection Arrangement.
- The surplus balance of de-delegated funds carried forward will continue to be ring-fenced and will be deployed in support of managing the annual costs of these funds, as well as in reducing the value of the on-going (new-year) contributions that are required from maintained schools. A total balance of £1.106m across the Schools and Early Years Blocks was brought forward from 2021/22. The total balance forecasted to be held at the end of 2022/23 will be presented to the Forum in December.

Central Schools Services Block 2023/24

The Authority's Central Schools Services Block (CSSB) DSG allocation is increasing by 2.23% per pupil in 2023/24. Our historic commitments lump sum however, is reduced from £225,150 to £180,115. The net total of our CSSB allocation for 2023/24 is currently estimated to be £3.543m, subject to October 2022 pupil numbers.

The table below shows the values of the commitments that are present within the CSSB, as a result of decisions taken previously by the Forum, and that are carried forward into 2023/24. The values of the funds shown below for 2023/24 include estimated increases for pay award / inflation, which will be funded from the CSSB settlement. The cost of copyright licences is estimated and will be confirmed by the DfE in December.

Commitment Heading	2022/23	2023/24	Difference
Copyright Licences	£367,500	£378,525	+ £11,025
Schools Forum costs	£11,000	£11,600	+ £600
Pupil Admissions	£931,300	£978,000	+ £46,700
Statutory & Regulatory Duties	£1,559,343	£1,532,211	- £27,132
Education Access Officers	£472,000	£496,000	+ £24,000
Education Services Planning	£140,000	£147,000	+ £7,000
Total Central Schools Services Block 2023/24	£3,481,143	£3,543,336	+ £62,193

As a reminder, in 2022/23, the Forum increased the CSSB budget for Pupil Admissions and also agreed a new contribution to Education Services Planning. All other CSSB budgets were simply adjusted for inflation / pay awards, to the extent that this was affordable within the 2022/23 CSSB settlement. The Authority anticipates that, for 2023/24, the Forum will agree to continue the 'pass back' of the funds that are set out above and that are already allocated to the Authority. The Authority proposes that, as in 2022/23, the full value of the CSSB settlement is allocated to CSSB activity. Prior to 2022/23, we transferred a small value of CSSB funding to the High Needs Block, in support of pressures within this Block. However, due to the limited 2023/24 settlement, the continuing reduction in historic commitments funding, and the impact on CSSB income of reducing numbers of pupils in mainstream schools and academies, our CSSB is under greater and increasing financial pressure. This can be seen simply in the table above, in the necessity to reduce the CSSB budget for Statutory and Regulatory Duties in 2023/24 in order to avoid overspending against the estimated £3.543m CSSB allocation that will be available to us. We carried forward £0.231m of surplus balance within the CSSB at the end of the 2021/22 financial year. Subject to the spending position in 2022/23, we are likely to propose that a proportion of this balance is allocated in support of the 2023/24 CSSB budget. We will discuss this further with the Schools Forum in December / January.

Also for the Forum's awareness, as we raised at the Forum's 14 September meeting, there currently is no increase in CSSB funding specifically in response to the new statutory attendance responsibilities that are being placed on local authorities. The absence of additional monies here is a particular point of concern, and we are aware that representations are currently being made to the DfE on this in relation to "new burdens".

Maintained Schools De-Delegated Funds - Introduction

De-delegation is a mechanism through which contributions, for centrally managed funds and services, can be collected from all maintained schools within a specific phase. The cessation of de-delegation would not itself prevent the existence of centrally managed services. Where buy in by academies remains strong, and would be strong from maintained schools, services could continue on a traded services model.

Members are reminded that the Schools Forum has previously established the principle that the values of contributions per pupil to some de-delegated funds will not be increased in value on the previous year simply to compensate for the loss in budget resulting from the conversion of maintained schools to academy status i.e. all things being the same, as schools convert to academies, the cash values of de-delegated funds will reduce, with any gap in funding as a result of this reduction being recovered through the trading of services. This principle affects the following funds that are currently de-delegated from primary & secondary phases: Trade Union Facilities Time, Trade Union Health and Safety Rep Time and FSM Eligibility Assessments.

Details of the Item for Consideration (continued)

We have previously highlighted to the Schools Forum that the rate of conversion in Bradford of maintained schools to academy status may be such that consideration may need to be given, at an appropriate time, to whether de-delegation remains effective and efficient. The Authority would generally expect, and recommend, the Forum to continue de-delegation in 2023/24 where there is still evidenced value for money, critical mass (a sufficient number of maintained schools) and / or where the framework is already in place for academies to buy into centrally managed arrangements, such as for FSM eligibility assessments and for trade union facilities time. For the 2023/24 financial year, de-delegation cannot be applied to a school that has converted to academy before 2 April 2023. In addition, de-delegation must cease, from 1 September 2023, for any school that converts between 2 April and 1 September 2023. So, there is both a year on year impact as well as an in year impact on the values that can be taken to continue to support the cost of de-delegated funds.

In terms of the Authority's recommendations to the Schools Forum for the 2023/24 financial year:

De-Delegation: FSM Eligibility Assessment

The Local Authority recommends that de-delegation is continued from both the primary and secondary phases for Free School Meals (FSM) Eligibility Assessment, at the existing 2022/23 per FSM values, with contributions continuing to be taken using FSM Ever 6 data.

De-Delegation: Trade Unions Facilities Time

As the Forum reviewed in some detail (in 2018) the Authority's Trade Unions Facilities Time arrangements, and as buy into these arrangements from academies remains strong, the Authority recommends that de-delegation continues from all phases in 2023/24. The per pupil cost of these arrangements in 2021/22 was reduced by 5%, from £5.26 in total (for both facilities and health and safety time) to £5.00. The Authority expects to continue charging at the reduced rate of £5.00 per pupil in 2023/24.

De-Delegation: Maternity / Paternity 'Insurance' Scheme & Suspensions / Public Duties

The Local Authority recommends that the de-delegated fund for maternity / paternity insurance is continued for maintained nursery schools and for the primary-phase in 2023/24, with contributions set at a value to meet anticipated costs. Further work is taking place, but it is currently estimated that the price of the scheme will be in the region of £26.40 per pupil (compared with £20.29 in 2022/23). This price is after the release of £0.10m of carry forward balance and will provide a total estimated budget of £0.75m. The cost of this scheme is estimated, and will be substantially affected by both the pay awards as well as by the number of claims.

In recent years, whilst the total cash cost of the scheme has reduced, part of the reason for the increasing per pupil charge is that the cost has not reduced at the same rate as the loss of contribution from primary schools that have now converted to academy. Members representing maintained primary schools will be aware of the warnings that have been given previously about the viability of current arrangements for supporting maternity / paternity costs. We have warned, as happened in the secondary sector, that we may be moving towards the position where arrangements are no longer financially efficient or viable. This is due to the growth in costs at the same time as a reducing number of maintained primary schools. It is recommended that the maternity / paternity scheme does remain in place in 2023/24, because we still have 'critical mass' and also because we have a ring-fenced brought forward balance available to support the scheme's overall costs. However, the continuation of the scheme after 2023/24 will need to be reviewed.

The Authority recommends that de-delegation also continues in 2023/24 from maintained nursery and maintained primary schools for the suspensions / public duties fund, at the current per pupil value of £0.93.

De-Delegation: Exceptional Circumstances, SIFD and Academy conversion (deficit budgets)

De-delegation continued in 2022/23 to provide a fund to support maintained primary schools that may face exceptional circumstances. This fund is allocated according to criteria that are agreed with the Schools Forum. The Authority recommends that de-delegation for this purpose continues for the primary phase in 2023/24. This will be necessary, in particular, where the Authority / Schools Forum wishes to use the existing criteria to support maintained primary schools that are resolving exceptional budget issues related to under-subscription.

Primary maintained members established in 2017/18 a de-delegated fund to be available specifically to meet the cost of any deficit balances held by maintained primary schools that convert to academy status under sponsored arrangements. The first (and only) allocations against this fund were presented to the Forum in May 2019. The Authority has subsequently recommended, since 2020/21, that the de-delegation of additional funds for this purpose be paused. This continues to be the Authority's recommendation for 2023/24. The ring-fenced de-delegated fund carry forward balance would be used, if necessary, to meet any deficit costs.

Details of the Item for Consideration (continued)

De-Delegation: Fischer Family Trust Subscription (FFT)

In 2022/23, the Authority has continued to facilitate the subscription of the primary phase to FFT. The secondary phase, and other phases, are already required to subscribe to FFT directly, rather than purchasing through the Authority. Maintained primary schools have been charged £1.16 per pupil via de-delegation. Primary academies have also been able to subscribe to FFT via the Authority, on an individual optional basis, charged by invoice at the same £1.16 per pupil.

De-delegation for the purposes of subscribing all maintained primary schools to the FFT software has previously been established in recognition of the value of this software and of the significant savings (and value for money) that collective purchasing has delivered, when the engagement with the software is high. The usage of the FFT software however, has changed in recent years, and most recently has also been affected by the COVID-19 pandemic. It is appropriate that the Schools Forum now reviews de-delegation, and whether the Authority should continue in 2023/24 to facilitate a District-wide primary-phase subscription, with this financed in the majority via de-delegation from the maintained primary phase.

It is important to emphasise that, was the Schools Forum to decide not to continue de-delegation in 2023/24, the Authority would cease to facilitate subscription to FFT. This would mean that all schools and academies that wished to subscribe would do so directly. The Authority does not financially benefit from facilitating subscription. The Authority's view therefore, focuses on value for money for maintained schools and academies.

Owing to timescales set by Fischer Family Trust, it is necessary to ask Members representing Maintained Primary Schools to decide now on de-delegation in 2023/24 for the purposes of purchasing subscriptions to Fischer Family Trust on behalf of all maintained primary schools.

We have sent relevant members, prior to this meeting, some further information to help them take their decision. Please note that some of this is commercially sensitive and is not therefore, set out in this report.

School Improvement (SIMB Grant Replacement and School Improvement Support for Maintained Schools)

Since 2017, local authorities have received from the DfE a School Improvement Monitoring and Brokering Grant (SIMB), to support their "core" school improvement activities, with the amount received calculated to be proportionate to each authority's number of maintained schools. The DfE is ceasing this Grant at March 2023, with the value allocated in 2022/23 already reduced by 50%. In 2021/22, the Authority received £285,854 in SIMB Grant. So far in 2022/23, we have received £51,275, and we estimate we will receive a further £65,000 for the period September 2022 to March 2023. A total of £116,275.

The DSG Regulations have been adjusted to permit local authorities to fund all improvement activities, including the core improvement activities previously funded by the SIMB Grant, via de-delegation of funds from maintained schools' budget shares, with the agreement of their Schools Forum or with the agreement of the Secretary of State, in instances where the Schools Forum does not agree. Effectively, authorities are required now to charge maintained schools for their school improvement support, with the DfE's view being that this approach brings maintained schools in line with the academies sector.

With the agreement of the Schools Forum, we initially de-delegated a sum of £133,000 from maintained primary and secondary schools for the 2022/23 financial year, with contributions taken at £4.29 per pupil. Adjusting for the conversion of maintained schools up to September 2022, the final sum de-delegated in 2022/23 is £122,060. Added to the SIMB Grant, a total of £238,335 (still estimated) is available to the Authority in this current financial year.

Within the 2023/24 DSG budget setting cycle, we will need to agree the value of de-delegation for school improvement support, in the context of the full cessation of the SIMB Grant. On current estimates, inclusive of academy conversions up to 1 October, retaining a contribution of £4.29 per pupil would only produce a budget of £112,000 in 2023/24, with this split £89,000 primary and £23,000 secondary. We would expect that this budget would reduce further following additional academy conversions between now and September 2023.

The Local Authority has a programme of monitoring, intervention and support. In 2022/23, the Authority is using the 50% reduced SIMB Grant, combined with the replacement 50% monies available following new de-delegation, to continue this programme for the period April 2022 to March 2023.

Without the continuation of funds via de-delegation, the Authority will not have the resources on an on-going basis to continue to financially support school improvement in maintained schools, as it does currently. In this context, whilst the decision on de-delegation is one for the Schools Forum, was the Forum to not approve any de-delegation, it is very likely that the Authority would need to consider an approach to the Secretary of State. We anticipate however, that the discussion with the Forum will more focus on funding the right quantity and type of school improvement support, and reviewing the impact and value for money of this support.

Details of the Item for Consideration (continued)

A large proportion of the Authority's current programme allocates monies to reimburse schools that provide peer-to-peer school-led support for maintained schools. A good proportion of the programme also provides maintained schools with support for governance. Key activities are:

- Induction of new headteachers (support for each new headteacher of a maintained school from an experienced and success Headteacher Partner).
- Support for interim / acting headteachers (support for each new headteacher of a maintained school from an experienced and success Headteacher Partner).
- Curriculum support for middle leaders in primary schools and subject heads in secondary schools.
- Support to Schools Causing Concern, with the support model activities split between the Local Authority and a partner school.
- Leaders of Governance support schools where governance needs development, challenge and modelling of good practice.
- Advice to governing bodies in difficulty.

The Authority's published Schools Causing Concern (intervention) guidance is at the base of the Authority's approach here. Further information on this is published on Bradford Schools Online and Forum members are recommended to review this: <https://bso.bradford.gov.uk/Schools/CMSPage.aspx?mid=3527>

In terms of allocation, the Authority's academic year SIMB programme has previously typically estimated the following:

1. Induction of new headteachers – 5 days support for each new headteacher of a maintained school, from an experienced and successful headteacher partner. Estimated at 6 schools at £2,500 per school. Total of £15,000 per year.
2. Support for interim or acting headteachers – 5 days support for each interim or acting headteacher of a maintained school from an experienced and successful headteacher partner. Estimated at 3 schools at £2,500 per school. Total of £7,500 per year.
3. Support to bring about rapid improvements in maintained schools causing concern. The model for each school will be bespoke, but typically will include leadership support, teaching support and mentoring and support for governance, delivered by a partner school, and additional monitoring by an Authority advisor and support from other consultants (such as early years), with monitoring through school review days. Allocation is decided against a costed improvement plan, which is submitted to Authority's Schools Causing Concern Group and which is then monitored through the Authority's Scrutiny Group meetings that take place with the school's headteacher and chair of governors. Estimated at 10 schools at c. £15,000 per school. Total of £150,000 per year. This is the largest single area of use of funding.
4. Additional support:
 - a. Delivered by Leaders of Governance, to support schools where governance requires support, challenge and modelling of good practice. Estimated at up to 1 year's support (for 8 meetings) for 10 schools at £2,400 per school. Total of £24,000 per year.
 - b. Additional advice to governing bodies in difficulty. Estimated at £1,000 per school for 10 schools. Total of £10,000 per year.
 - c. Core governance support (proportion of governance officer salary to support the delivery of the School Improvement Support programme). Estimated at £25,000. Total of £25,000 per year.
 - d. Curriculum support for middle leaders in primary schools and for subject heads in secondary schools. Estimated at £25,000 for primary-phase and £25,000 for secondary-phase. Total of £50,000 per year.

To its fullest extent, this programme would cost c. £282,000. However, the programme is based on estimates of delivery. But, even not at its fullest extent, this current programme would cost substantially more than the funds that would be generated by continuing de-delegation in 2023/24 at £4.29 per pupil.

The Schools Forum has previously requested that the Authority provides further information on the impact of this school improvement support programme. This assessment, alongside further information on the actual cost (rather than planned) of the programme in 2021/22, and anticipated cost for 2022/23, will be presented to the Forum in the December meeting. The primary purpose of this report is to remind Forum members of the requirement to decide on these arrangements within the 2023/24 DSG cycle, and to give members the opportunity to ask further questions or to ask for additional information.

Details of the Item for Consideration (continued)

Early Years Block - Central Funds Annual Review

We have previously presented benchmarking information to the Schools Forum, which has evidenced that we are a relatively low central retainer of funds within the Early Years Block, when we compare ourselves with other authorities and with relevant averages. Forum members will also be aware of the regulatory restriction within the Early Years Block, which requires that a minimum 95% of 3&4-year-old entitlement funding be delegated to providers, via our Early Years Single Funding Formula (EYSFF) and Early Years SEND Inclusion Fund (EYIF), meaning that a maximum of 5% of such funds can be spent otherwise, including on centrally managed services that support the delivery of the entitlements, and on supporting rates of funding for the 2-year-old entitlement.

As we reported to the Forum in January, 97.2% of our estimated 2022/23 3&4-year-old entitlement funding (excluding the allocation of brought forward balances) will be passed-through to providers; meaning that we are well within the 95% requirement. The latest Early Years Block benchmarking for 2022/23 has just been published, and we will assess and present this in December, as part of the further information that will support our annual review of Early Years Block centrally managed funds. Our initial assessment is that we continue to be a low central retainer. In the context of the current financial climate, including the significant budget challenge that faces the Local Authority, we wish to ensure, whilst being very aware of the need to maximise the funding rates for entitlement providers, that the Early Years Block appropriately contributes to the Authority's early years function, especially where the Authority's non-DSG budget currently supports this function, in addition to DSG funds. We wish to discuss this further with the Schools Forum within the 2023/24 DSG cycle, and will present a further report in December. We also expect to present our consultation on the 2023/24 EYSFF to the Schools Forum in December, which will set out proposed provider rates of funding. The Authority is currently reviewing whether the contribution that the Early Years Block makes to the cost of the Authority's early years and entitlement support function should increase in 2023/24, using some of the flex (between 97% and 95%) to do so. In 2022/23, we agreed a new contribution to the Authority's function, of £0.100m. We are reviewing whether to propose that this contribution is increased.

The table on the first page of this report shows the funds that have been held centrally within the Early Years Block in the 2022/23 financial year. A total of £0.432m. Prior to April 2021, the costs of the Area SENCOs (supporting Private, Voluntary and Independent providers), and of the contribution to early years SEND support services, were charged to the Early Years Block. In seeking to protect the Early Years Block, during the COVID-19 pandemic, we transferred these costs on an exceptional basis to be met by the High Needs Block, with the intention to transfer the costs back at an appropriate time. Within the 2022/23 planned budget, we transferred the cost of the Areas SENCOs (£0.204m) back to the Early Years Block, but the cost of the contribution to early SEND support services continued to be met by the High Needs Block. In support of managing the financial pressure that is now increasing within the High Needs Block, subject to affordability, we are minded to return the contribution to early years SEND support services (£0.332m) to the Early Years Block in 2023/24. We will discuss this further in a report to the Forum in December.

Implications for the Dedicated Schools Grant (DSG) (if any)

Recommendations will have direct implications for the distribution of the Central Schools Services Block, Schools Block and Early Years Block in 2023/24.

Recommendations

- (1) The Forum is asked to review the position of Central Schools Services Block, Schools Block and Early Years Block central funds and de-delegated items, to indicate what further consideration should be given / review work should take place, in advance of making final recommendations for 2023/24 at the January 2023 meeting.**
- (2) Members representing Maintained Primary Schools are asked to decide on de-delegation in 2023/24 for the purposes of purchasing subscriptions to Fischer Family Trust.**

List of Supporting Appendices / Papers (where applicable)

Appendix 1 – Benchmarking of Funds

Contact Officer (name, telephone number and email address)

Andrew Redding, Business Advisor (Schools),
01274 432678
andrew.redding@bradford.gov.uk

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Figures are based on 2022/23 S251 Budget returns to the DfE & Benchmarking Tables published 29 September 2022


Type	Net Per Pupil Spend 2022/23 (Median Averages)						negative = Bfd is lower				Comments
	Bradford 2022/23 DSG Budget	Bradford £app (unrounded)	England National Median (rounded)	Statistical Neighbours Median (rounded)	Met Districts Median (rounded)	Yorks & Humberside Median (rounded)	Bfd Cash Difference to National	Bfd Cash Difference to Stat Neigh	Bfd Cash Difference to Met Dist	Bfd Cash Difference to Y&H	
1.1.1 Contingencies (exceptional circumstances & SIFD)	£76,142	£2.17	£2.00	£0.00	£4.00	£7.00	£5,946	£76,142	£64,250	£169,544	De-delegation from primary phase only
1.1.2 Behaviour Support Services	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We ceased de-delegation at September 2018
1.1.3 Support for UPEG and Bilingual Learners	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We ceased de-delegation at April 2016
1.1.4 FSM Eligibility Assessment	£47,047	£1.34	£0.00	£1.00	£1.00	£1.00	£47,047	£11,949	£11,949	£11,949	De-delegation from both primary & secondary phases
1.1.5 Insurance	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We have never de-delegated
1.1.6 Museums / Libraries	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We have never de-delegated
1.1.7 Licences / Subscriptions	£27,229	£0.78	£0.00	£0.00	£0.00	£0.00	£27,229	£27,229	£27,229	£27,229	FFT Subscription from the primary phase only
1.1.8 Staff Costs Supply Cover - excluding Facilities Time	£498,590	£14.21	£0.00	£14.00	£2.00	£0.00	£498,590	£7,218	£428,394	£498,590	Maternity 'Insurance' Scheme for the primary phase only
1.1.9 Staff Costs - Supply Cover for Facilities Time	£154,863	£4.41	£2.00	£4.00	£4.00	£2.00	£84,667	£14,471	£14,471	£84,667	We reviewed 2018; 5% reduction in charge 21-22; both prim & sec
Total Schools Block De-Delegated Items (Maintained Schools)	£803,870	£22.90	£20.00	£34.00	£25.00	£20.00					
1.3.1 Central Expenditure on Children Under 5	£194,648	£1.36	£13.00	£11.00	£12.00	£13.00	£1,659,399	£1,374,161	£1,516,780	£1,659,399	Excludes EYB contributions recorded on SEND S251 lines (1.2->
1.4.1 Contribution to Combined Budgets (all phases)	£0	£0.00	£3.00	£0.00	£3.00	£3.00	£310,719	£0	£310,719	£310,719	We ceased budget provision at September 2017
1.4.2 Pupil Admissions (all phases)	£931,300	£8.99	£8.00	£10.00	£7.00	£8.00	£102,716	£104,430	£206,289	£102,716	We increased the CSSB budget in 2022/23
1.4.3 Servicing of Schools Forums (all phases)	£11,000	£0.11	£0.00	£0.00	£0.00	£0.00	£11,000	£11,000	£11,000	£11,000	Budget was increased from £10,000 to £11,000 in 2022/23
1.4.4 Termination of Employment Costs	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.5 Falling Rolls Fund	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We introduced for primary phase April 2019 (no new budget 22/23)
1.4.6 Capital Expenditure from Revenue (CERA)	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.7 Prudential Borrowing Costs	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.8 Fees to Independent Schools without SEND	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.9 Equal Back Pay	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.10 Schools Block Growth Fund (primary, secondary)	£1,051,498	£10.15	£14.00	£19.00	£14.00	£14.00	£398,524	£916,389	£398,524	£398,524	As per our Growth Fund arrangements
1.4.11 SEND Transport	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.12 Exceptions agreed by the Secretary of State	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.13 Infant Class Sizes	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose
1.4.14 Copyright Licences	£471,154	£4.55	£5.00	£5.00	£6.00	£5.00	£46,711	£46,711	£150,284	£46,711	Copyright Licences are charged by DfE model
1.5.1 - 1.5.3 Regulatory and Statutory Functions (all phases)	£2,221,343	£21.45	£14.00	£13.00	£15.00	£15.00	£771,321	£874,894	£667,748	£667,748	CSSB spend relationship with lines 1.4.1; 1.4.2; 1.4.3; 1.4.14; PFI
1.6.1 - 1.6.6 De-delegation to replace ESG (Maintained Schools)	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We have not so far 'de-delegated' for this purpose
1.6.7 School Improvement (SIMB Grant Replacement)	£133,000	£3.79	£0.00	£0.00	£0.00	£0.00	£133,000	£133,000	£133,000	£77,588	We introduced de-delegation 2022/23 (replacement 50% of SIMB)
1.7.1 Other Specific Grants	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0	£0	£0	£0	We do not take budget for this purpose

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Further Info on Schools Block De-Delegated Funds	
Type	
1.1.1 Contingencies	
1.1.2 Behaviour Support Services	
1.1.3 Support for UPEG and Bilingual Learners	
1.1.4 FSM Eligibility Assessment	
1.1.5 Insurance	
1.1.6 Museums / Libraries	
1.1.7 Licences / Subscriptions	
1.1.8 Staff Costs Supply Cover - excluding Facilities Time	
1.1.9 Staff Costs - Supply Cover for Facilities Time	
1.6.1 - 1.6.6 De-delegation to replace ESG (Maintained Schools)	
1.6.7 School Improvement (SIMB Grant Replacement)	

No. of Authorities that De-Delegate (2022/23)			
England National *	Statistical Neighbours	Met Districts	Yorks & Humberside
87	5	26	11
49	3	13	6
45	3	17	5
69	7	19	9
16	3	4	1
8	1	5	3
34	2	8	3
58	6	19	7
110	9	32	13
62	3	13	4
65	4	17	12

% of Authorities that De-Delegate (2021/22)			
England National	Statistical Neighbours	Met Districts	Yorks & Humberside
57%	45%	72%	73%
32%	27%	36%	40%
30%	27%	47%	33%
45%	64%	53%	60%
11%	27%	11%	7%
5%	9%	14%	20%
22%	18%	22%	20%
38%	55%	53%	47%
72%	82%	89%	87%
41%	27%	36%	27%
43%	36%	47%	80%
(out of 152)	(out of 11)	(out of 36)	(out of 15)

 = 50%+ of authorities de-delegate

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